THE Consultants are here For You

Your Financial Mentor

They are your finances but you are busy and you cannot do everything. You need a Financial Mentor

You know Warren Buffett, the Oracle of Omaha, the world’s wealthiest investor. But, before him, there was Benjamin Graham, economist. Every good story starts with adversity. In 1914, Graham began a successful career on Wall Street.

And then came the stock market crash of 1929 and his nest egg broke.

Graham learned his lesson, minimize downside risk by investing in value stocks and avoiding speculation. The concepts that he developed were published in The Intelligent Investor, in 1949.

Warren Buffett read Graham’s book and enrolled in Columbia Business School where he could study under Graham. They became lifelong friends. Buffett went on to work at Graham’s investment company.

Warren Buffett worked with Graham until Graham’s retirement. Buffett’s investment approach differed from Graham’s but you can see from Buffett’s success that he never abandoned the core principle of value investing.

Where do I get My Advisor?

You want someone who is successful, someone who has encountered adversity and learned to move beyond it.

You look for someone who cares about you. That person’s experience is something you can build on. That person wants you to succeed.

You want someone you can trust. Someone you can share your goals, ideas with. Someone challenges you to be the best.

You want a guide.

You want a Mentor.

Is Your Financial Advisor a Mentor?

THE Consultants are successful business persons. They

have had successful careers in Finance. They have the know-how to make good financial decisions.

They can mentor You with Your financial decisions.

Financial professionals understand money. They understand the responsible use of money.

Good money management:

• Properly allocates revenues to business goals

• Is consistent with short and long-term goals

• Properly allocates all resources

• Evaluates the effectiveness of resource allocation

• Evaluates tax ramifications of financial decisions

These decisions that every business faces are the same decisions that you, as an individual, face:

• Goal evaluation

• Spending

• Resource allocation

• Investment performance

• Tax ramifications of various investing strategies

Why should I trust my Advisor to mentor me?

THE Consultants and its professionals are registered with FINRA and they meet federal and state licensing requirements

They have a fiduciary responsibility to you.

Warren Buffett and his mentor Ben Graham described value investing keeps. Ben Graham, who lost his nest egg in the 1929 crash, saw the exuberance of the crowd and the irrationality of investing. By setting guidelines for investing, his approach avoided a future of boom and bust for the individual investor. It may not be glamorous but glamour is not a reason for investing.

Graham wrote about a fictional office mate, Mr. Investor, who came in with a new idea every week. Each idea had a great story some of the ideas were interesting and other did not make sense. The trick is to ignore Mr.

Investor. Learn the actual value of the investment.

Your mentor wants your value to grow. Offers come across the desk every day. Some offers come with unlimited upside and no downside. Some offers come with a great idea but do not have a management team.

Your THE Consulting mentor is not going to show you marketing gimmicks. Each product is evaluated with real world standards.

• What is being offered? Does the story work?

• Does management have a track record?

• Are risks identified and addressed?

Your mentor is not relying on deals to make on the side.

Your portfolio is built on what works for you. Suggestions that you can trust. Products that fit your risk/reward profile. Investments for what you want and when you need it.

When you communicate with your Advisor.

Your mentor will help you define your goals.

• Are you enjoying your work or are you ready to move on to the next phase of your life?

• Do you want to get more training/education?

• Have you always wanted to volunteer your services and is now the time?

• Do you just want to retire, buy a boat, and sail off into the sunset?

• Are you starting a family?

• Moving your family out into the world?

When you discuss products, it is your risk profile that is important. Your desires that are important. How economic waves affect your investments are important.

Your mentor is not a rookie and your future is not a test drive for unknown quantities. Your finances, now and in the future, are what matter.

Now what?

Press the

Contact Us

Button.

Get to know us. If we are going to be your Mentor, you have to know us. You have to know that you can trust us and that we care about your goals and your future.

Ask us about our investment philosophy. Do we understand you? Do we listen to you?

Communication is Key

We want to know about you, too. We have to know that you understand our investment strategies. Our responsibility means that our suggestions are appropriate for you.

Are you concerned about having sufficient money to maintain your needs? Are you worried that the economy will destroy your savings? Are you simply not sure what you want yet but you want to be ready for the future?

Let’s talk.