



Build. Preserve. Prosper.

*If you didn't have to worry about money,
what would you do?*

Give yourself permission to dream.



Plan a fairy-tale wedding.



A solid foundation.

Build

The freedom to pursue your dreams comes first from having a solid financial foundation.

Well-chosen investments make it easier to spend time enjoying your life.

Hire a contractor to remodel our house.



Preserve

It's not what you make, it's what you keep.

Wherever you are in your life, you worked hard to earn your money. We focus on preserving your wealth so you can focus on what really matters.

Spend more time with the girls.

Prosper

Live your dream.

When properly tended, your money should create prosperity, and with it, a peace of mind that is priceless.

Portfolio Strategies works hand in hand with your financial adviser. Together our goal is to help you achieve your dreams.



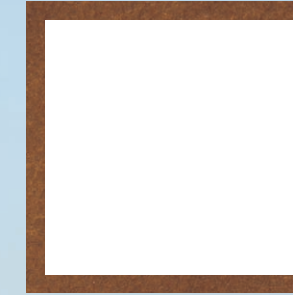
Pay for her education.



Take the whole family on a vacation.



About Us



Portfolio Strategies is dedicated to serving investors who realize the importance of market-responsive, professional money management.

Since its formation in 1982, the firm has grown to manage assets for individuals, endowments, foundations, and corporations. While things change by the minute in the financial world, the guiding principles behind the success of Portfolio Strategies have remained constant.

Portfolio Strategies' mission is to pursue solid and steady growth, and to contain risk and volatility. The company combines innovative approaches to money management with teams of seasoned portfolio managers. Portfolio Strategies offers a range of investment options spanning the needs of today's investors. Each investment program has its own distinct character and objectives to help

provide maximum diversity in approach, while retaining the company's core commitments to capital preservation and growth.

Assisting investors on a one-to-one level are independent financial advisers, whose expertise lies in aligning the investor's profile and objectives with specific program offerings. The highly personalized nature of this service is what allows Portfolio Strategies to deliver consistent investment management, for large and small investors alike.

Integrity and exemplary customer service are more than just the qualities that have defined Portfolio Strategies since its beginning; they are at the heart of the company's promise to each and every investor it is proud to serve.





PORTFOLIO *Strategies*
INVESTMENT MANAGERS

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