

Integrated Advisory Services for Every Stage of Life

Asset Management

Unique, ever-changing wealth considerations require an asset manager who is flexible and dynamic. That's why Stableford Capital designs your investment strategy based on your unique goals and financial situation.

As a client of Stableford Capital, you gain access to strategies that are constructed with an institutional approach to investment decision making. We also play a hands-on role in continuously researching, executing, and managing your portfolios, while keeping you informed at all times. This customized, active approach is designed to increase confidence and help maximize your financial success.

Our Asset Management Services Include:

- Investment strategy development, including environmental, social, and governance (ESG) options
- Portfolio management
- Risk management

Striking the Balance

Stableford leverages proprietary risk management strategies and software to carefully invest with an eye toward downside risk first and potential appreciation second. This approach balances minimizing your risk with maximizing returns. By coupling risk management with active advising and honest communication, Stableford helps protect and grow your wealth through all seasons of life.

For more information on the value of working with a straightforward, yet sophisticated investment advisor who seeks to provide you and your family with peace of mind, visit StablefordCapital.com.

Evaluating Your Asset Management

- What is your risk tolerance and does it align with your current investments?
- What is the asset allocation when looking at all your assets?
- Why is it more important to measure the success of your investment strategy based on your financial plan instead of a specific benchmark?
- What is the difference between active and passive management?
- Should you contribute more to your 401k or retirement accounts?



14648 N. Scottsdale Rd #130 • Scottsdale, AZ 85254
Scottsdale • San Francisco • Atlanta • Fairfield • Chicago
480.493.2300 • stablefordcapital.com