

Three Bucket Offense



- Clients need to take questionnaire , then work with SWM to establish a core satellite stock strategy. Portfolios 8-12 of risk are run through Schwab Intelligent Portfolios. ETF Allocation is run by an algorithm that Schwab implements.
- There are several real estate investments available for accredited investors for both the debt and equity. We work with sponsors and firms who have a solid long term track record, low volatility, and have a local management team where we can meet and monitor our investments and upcoming opportunities.
- Income Strategies are extremely low yielding in comparison to historical yields. Investments in bonds are very unappealing in today's current economic environment.

