What is Discretionary Portfolio Management?

Most people today are too busy and unable to find adequate time to manage and optimize their investments or simply not comfortable with the responsibility of making the necessary day to day decisions to successfully navigate today's fast-moving and complex markets. This is where our unique premium discretionary managed program is beneficial as it has been designed to put our resources to work allowing us to efficiently manage your wealth freeing you from the day-to-day "buy-sell" decisions by eliminating discussion for every portfolio transaction. This is similar in nature to the way that you place your trust with a pilot to make ongoing appropriate course corrections, without consultation, ensuring you arrive safely and comfortably to your desired destination with minimal turbulence and delays.

Portfolio Managers differ from mass-market advisors as they are specialists who have undergone significant additional training and manage larger amounts of money for fewer clients.

Discretionary portfolio management overcomes the shortfalls of traditional advisory services and reduces costs by delegating the responsibility of the decisions for your investments to our qualified and experienced team utilizing our rigorous investment process. Within a structured and disciplined process, our portfolio managers apply the full capabilities of their training to recognize and swiftly implement the complex day-to-day decisions necessary due to ever changing market conditions and make discretionary adjustments to update your portfolio to ensure that your investments are always in the right place at the right time.

Your portfolio is constructed as uniquely as you, as it is based on personal factors such as growth requirements, income needs and risk tolerance. Because your approval is not required for every single transaction, your dedicated Portfolio Manager is able to take advantage of investment opportunities quickly and efficiently. We work within specific guidelines established in advance, which are regularly reviewed, adjusted according to your needs and are managed according to the highest industry standards.

In addition, this program provides enhanced regular reporting and will offer you the convenience, confidence and peace of mind knowing your wealth is being professionally managed. As a result, this service will free your time allowing you to concentrate and pursue your most important business or personal interests while achieving your financial objectives and lifetime family goals.

Discover the Life Span Difference™

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