

INVESTMENT MANAGEMENT

Are you overwhelmed with the thought of investing your money in stocks, bonds, or mutual funds? Did your investment returns suffer from recent market declines? Are you unsure when it comes to choosing the right investments to preserve and increase your wealth? If you do not have the expertise or the time to monitor your own portfolios, investment management may be the right solution for you.

HOW CAN KABAREC FINANCIAL ADVISORS HELP YOU WITH YOUR INVESTMENTS?

Our investment team will work closely with you to establish your life and financial goals. We will help you assess your risk tolerance to determine the balance of risk and return objectives appropriate for you. As advisors, we will identify and analyze constraints of your investment portfolio such as liquidity, investment horizon, taxes, and your unique needs. Depending on your objectives and constraints, our professionals can create a personalized investment strategy that addresses several important issues such as asset allocation, diversification, risk, tax efficiency, and income generation.



KABAREC FINANCIAL ADVISORS, LTD
BUILDING BETTER FUTURES

Unlike many other financial advisors, we not only use external fund managers but also possess our own research capabilities to select individual stocks and fixed income investments tailored for your needs.

WHAT IS THE FIRM'S INVESTMENT PHILOSOPHY?

Kabarec Financial Advisors, Ltd. believes that only a long-term oriented and diversified investment approach will reward investors over a complete market cycle. We use a top-down approach to analyze the macroeconomic environment before we choose the individual investments. Aiming to deliver consistent returns over the long run, we proactively construct, monitor, and maintain your investment portfolio by deploying the following investments.

Investments may include:

- ◇ Short-Term Cash Reserves
- ◇ Fixed Income Securities
- ◇ Individual Stocks
 - Large and Small Companies
- ◇ Mutual Funds
 - Large and Small Companies
- ◇ Real Estate
- ◇ Natural Resources
- ◇ Venture Capital
- ◇ International Securities
- ◇ Market Neutral Securities