

Our IAP™ is more than diversification

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Investors may often hear the term Asset Allocation. So, what does that mean?

In its simplest form this refers to what portion of an investor's portfolio is allocated to stocks versus bonds.

A more granular version this could refer to what portion of an investor's portfolio is allocated to US & Foreign Small Cap Stocks, US & Foreign Large Cap Stocks, US & Foreign Value Stocks, US & Foreign Growth Stocks, US & Foreign High Profitability Stocks, US & Foreign Low Profitability Stocks, US & Foreign Real Estate Investment Trusts (REIT's), US & Foreign Government Bonds, US & Foreign Investment Grade Bonds and US & Foreign Junk Bonds.

Other models might also include an Allocation to Commodities, Structured Products, Private Equity or Hedge Funds. A rational Investment Allocation Process™ is the foundation of building a Purposeful Portfolio.

At Warburton Capital we've thought long and hard about this and have actually received a Trademark for our Investment Allocation Process™ or IAP™. Want to chat about this important and fascinating topic? We would love to discuss it with you.