

Asset Management

Asset Management Perspectives CAM Capstone

Wealth Creation

- Investments
- Retirement
- Real Estate
- Gold
- Global
- Businesses

Wealth Preservation

- Trusts
- Succession
- Wills
- Education
- Retirement
- Etc.

Risk Management

- Life
- Home
- Auto
- Health
- Disability
- Business Interruption
- Succession Planning Insurance

Liability

- Where can you be attacked
- Use of Entities
- LLC Corps Partnerships
- Insurance Coverage and Analysis
- Umbrella
- Tax issues
- Estate Tax

Cash Flow

- Salary
- Bank Accounts
- Merchant Accounts
- TOD POD
- Business Control
- Names on Checking Accounts
- Rents, Royalties, Dividends etc.

Big Picture

- Asset Allocation
- Asset Protection
- Annuities
- Trusts
- Global Investing
- Macro Forces

Conclusion

- Focus on Assets and Creation
- Do you manage yourself
- Technology is Amazing
- Do you trust a professional?
- What about the fees
- Hire a Portfolio Manager
- Focus on what you do best?
- Tax, Retirement, Estates?
- Not a problem unless your money grows.

Thank You

- Thank you for your efforts, time and participation.
- Email or Call anytime.
- Papers Due

References

- 24 Essential Lessons for Investment Success by William O'Neil and CANSLIM
- **Beginners' Guide to Investing: Online Publications at the SEC -**
<http://www.sec.gov/investor/pubs/begininvest.htm>
- **Get the Facts: The SEC's Roadmap to Saving and Investing -**
<http://www.sec.gov/investor/pubs/roadmap.htm>
- <http://www.sec.gov/investor/pubs/takingstock.htm>
- **Types of Orders**
http://www.schwab.com/public/schwab/research_strategies/market_insight/investing_strategies/stocks/order_types_what_they_mean_and_how_theyre_handled.html
- **View More Information on Different Types of Investments:**
<http://www.sec.gov/investor/pubs/investop.htm>
- [A Guide to Understanding Mutual Funds](#) – A publication from the ICI that explains mutual funds, describes how to establish realistic goals, and suggests questions to ask before you invest. (Provided in [PDF](#) format.)
- **Exchange-Traded Funds (ETFs) -** <http://www.sec.gov/answers/etf.htm>