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Don't Miss Out

Join us in this month's newsletter as we share an inspiring personal client story, provide insight into upcoming events, and offer closing thoughts on our investment philosophy, featuring a quote from Eugene Fama.

Client Story

John, a highly intelligent MBA holder, had made bad investment decisions due to fear. After transferring his funds to us, he revealed that he hired us to prevent himself from making emotional and bad behavior decisions with his portfolio. Our academic and factor-based investment philosophy resonated with him.

During his annual review, John's statement about hiring us as his "firewall" to prevent bad decisions made me feel proud of our work together. We had established a sound investment strategy based on solid research, helping him overcome his fear-based decisions that had led to negative outcomes in the past.

We emphasized the importance of good behavior in investing during

our conversation. We discussed how even the best investments could lead to running out of money in retirement if made with bad behavior. Conversely, average investments with good behavior could create long-term wealth building. Good investments with good behavior would never result in running out of money.

John's statement showed his understanding of the need to stick to a solid investment strategy based on sound research and data, preventing emotions from influencing investment decisions.

In conclusion, John's decision to hire us as his financial advisors allowed him to take control of his investment strategy. Our investment philosophy reinforced the importance of sticking to a prudent academic portfolio based on research and data and avoiding negative outcomes resulting from emotional and bad behavior decisions.



Upcoming Events

April 20-21, 2023

Scottsdale, AZ (In Person)

Discover the life-altering truths of investing at the American Dream Experience and transform your financial future by understanding the fundamentals and fulfilling your purpose, ultimately empowering you and your loved ones to pursue your dreams. Register using the link below:

<https://sretirement.com/events/>

Closing Thoughts

The Efficient Market Hypothesis (EMH) suggests that financial markets are efficient, and beating the market long-term is improbable. Understanding EMH's principles helps make informed decisions and avoid unrealistic expectations. By staying focused on long-term goals, remaining disciplined, and having a well-thought-out plan, investors can increase their chances of financial success.

"I'd compare stock pickers to astrologers, but I don't want to bad mouth astrologers."
- Eugene Fama