



*Pursuing a Better  
Investment Experience*



**SSB**  
Managed Wealth, LLC

# *Our Reality is a Simple One*

*At SSB Managed Wealth, we provide comprehensive financial planning that involves more than just managing your investments. We are committed to understanding your overall financial picture and discovering your personal, business and retirement goals. By designing and implementing a comprehensive financial plan, we can manage your investments in a tax-efficient manner and ensure that you are on track to successfully grow your wealth and meet your life goals.*

**WE SUCCEED ONLY WHEN OUR CLIENTS SUCCEED.**

## **OUR FOCUS IS ON WEALTH MANAGEMENT**

SSB Managed Wealth is an independent, fee-only investment advisory firm. We answer only to you—ensuring that the investments we recommend are those that we believe to be appropriate for you.

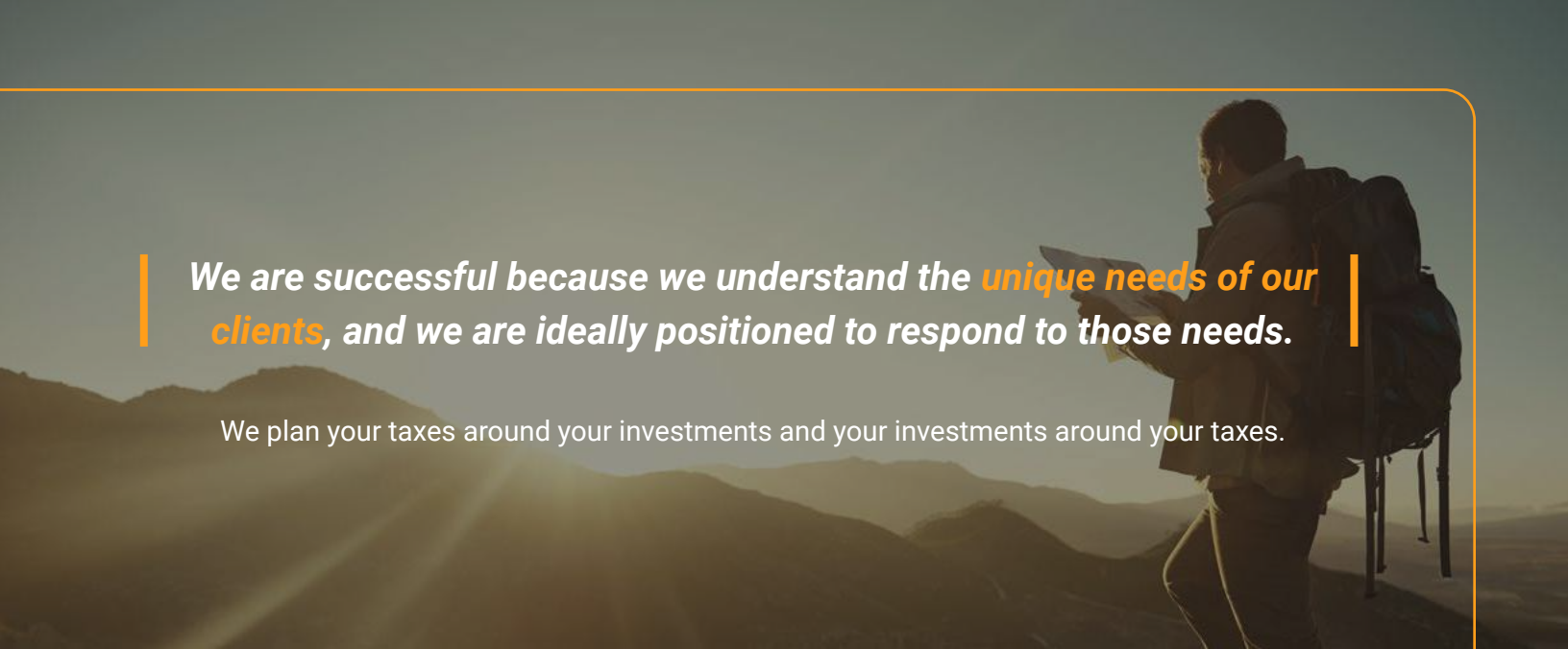
We believe that success in properly managing your assets is not measured by performance statistics, but by your success in achieving your goals. It's about understanding and managing risk and developing a disciplined investment strategy to provide you the investment returns you desire.

We are committed to providing an unsurpassed level of service and advice. Because no one can be an expert in everything, professional collaboration is essential to providing superior service to you. Our partnership with Capital Directions gives us access to a firm that enables us to focus on your financial planning needs while allowing them to craft an investment plan custom tailored to your unique needs, goals and values.

## **MANAGE EMOTIONS**

*Many people struggle to separate their emotions from investing. Markets go up and down. Reacting to current market conditions may lead to making poor investment decisions.*





*We are successful because we understand the **unique needs of our clients**, and we are ideally positioned to respond to those needs.*

We plan your taxes around your investments and your investments around your taxes.

## AVOID REACTIVE INVESTING



## FOCUS ON WHAT YOU CAN CONTROL

*We can offer expertise and guidance to help you focus on actions that add value. This can lead to a better investment experience.*

- Create an investment plan to fit your needs and risk tolerance.
- Diversify globally.
- Structure a portfolio along the dimensions of expected returns.
- Manage expenses, turnover and taxes.
- Stay disciplined through market dips and swings.

## LOOK BEYOND THE HEADLINES

*Daily market news and commentary can challenge your investment discipline. Some messages stir anxiety about the future while others tempt you to chase the latest investment fad.*

*When headlines unsettle you, consider the source and maintain a long-term perspective.*

RETIRE RICH

SELL STOCKS NOW

THE LOOMING RECESSION

TOP TEN FUNDS TO OWN

MARKET HITS RECORD HIGH

HOUSING MARKET BOOM





*Building On Trust*

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