

## Why Choose Garrett Portfolios?

You may outsource various day-to-day chores and responsibilities. By delegating certain activities, you have more time to focus on family, hobbies, volunteering—the things you enjoy most in life.

You may feel you don't have the time, desire or expertise to manage your own investment portfolio. Why not delegate the management of your portfolio to professionals?

**Let us help you with that!** Garrett Portfolios are professionally-managed, globally-diversified, low-cost portfolio solutions. Our expert investment professionals will manage a portfolio selected for your unique financial situation and help you maintain discipline to reach your investment goals.

## Philosophies for success.

### Relationships matter.

You'll continue to work closely with your financial planner, who will be your primary point of contact, and we'll work hard behind the scenes to manage your portfolio. This allows your financial planner to do what they do best—provide expert financial planning guidance and accountability to better position you to reach your financial goals.

Garrett Portfolios is a great alternative to higher-cost investment managers and going it alone. Use this scorecard to compare your options:

	DIY	Garrett Portfolios	Traditional Investment Manager
Fiduciary Advisor		Yes	
Ease of Implementation		Straightforward	
Professional Monitoring		Yes	
Quality of Portfolio		High	
Cost of Portfolio		Low	

### Together, we will help you:

- **Create an investment plan.** First, we'll create a proper overall stock/bond mix of investments based on your unique financial situation and your goals. Then, we'll control what we can by investing in a broad range of low-cost investments, while being aware of tax impacts.
- **Stick to the investment plan.** We'll help you maintain discipline to stay invested for the long-term, through the ups and downs.
- **Adjust the investment plan.** We'll closely monitor your portfolio and review your investment plan with you at least annually. We'll rebalance your portfolio to maintain your proper overall stock/bond mix of investments.

Garrett Portfolios is not a separate entity. "Garrett Portfolios" refers to a suite of portfolios offered by Garrett Investment Advisors, LLC and sub-advised by CGN Advisors, LLC.

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