FCMS
Freedom Capital Management Strategies®

INNOVATIVE INVESTMENT MANAGEMENT

Connecting Your Wealth to Your Goals and Dreams

Investment Team ›››

Our experienced team, with **over 40 years of collective experience**, actively manages your investment portfolio in partnership with your financial advisor.

Peter Murphy, CFA®
Chief Investment Officer

Brian Zabora, CFA®
Investment Director

Tyler French
Investment Analyst

Investment Philosophy ›››

Active Oversight
We actively manage your portfolio amid ever-changing markets and collaborate with you to ensure your investments remain aligned to your goals and dreams.

Modern Diversification
We offer a diversified suite of investment solutions that integrate traditional principles of investment theory with an innovative approach to portfolio construction.

Risk Management
Based on your unique financial situation and risk tolerance, we actively manage risk through asset allocation, diversification, and innovative risk mitigation tools.

Investment Team
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Hold more than
100
investment research meetings annually

Investment Team
›››
Write over
100
market and investment research reports annually

Investment Team
›››
Partner with leading independent economic research consultants

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Investment Selection
›››
1000+
investments screened annually through our quantitative process

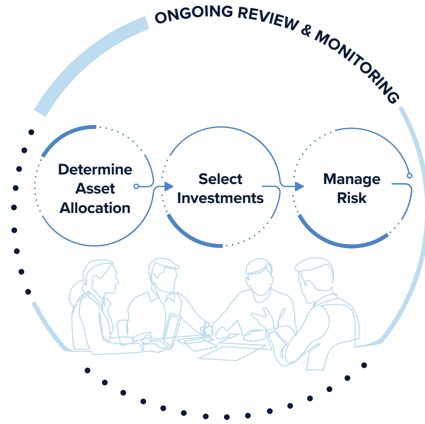
Investment Selection
›››
35+
asset classes analyzed annually for potential investment opportunities

Investment Monitoring
›››
Quarterly
portfolio attribution and asset allocation reviews for all strategies

Investment Monitoring
›››
Annual
due diligence meetings with portfolio managers of all active funds in which we invest

Investment Process ›››

The increasingly complex financial markets of today require a disciplined and dynamic investment process that is grounded in rigorous, objective due diligence and has the capacity to adapt as markets evolve over time.

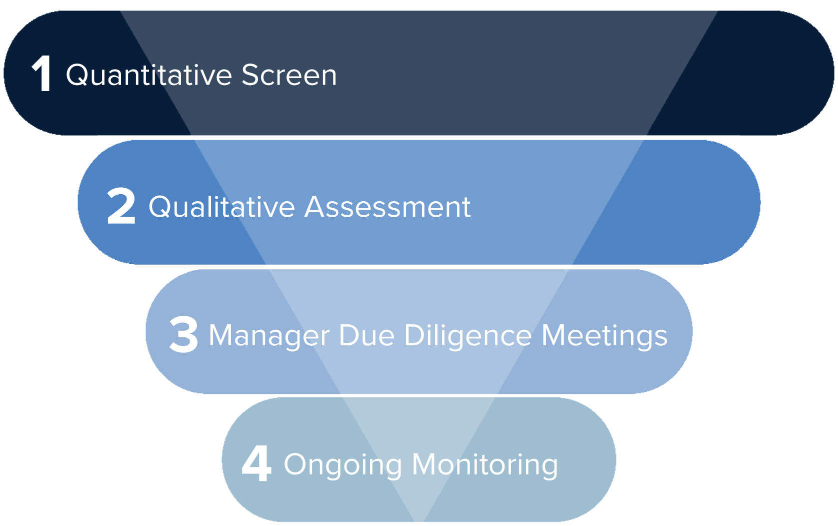


How It Works ›››

Determine Asset Allocation
We create a strategic policy portfolio for each investment strategy we manage based on a targeted investment objective and risk profile, which serves as a blueprint.

Select Investments
Our comprehensive investment section process involves the evaluation of thousands of investment options across mutual funds, ETFs, and individual securities to identify those that are best suited for each of the investment strategies we manage.

Manage Risk
We proactively manage risk in your investment portfolio through our rigorous due diligence process, diversification, and the ongoing review and monitoring of your investments.



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