Bridgeview Wealth Launches Second Opinion Services

Bridgeview Wealth launches a portfolio evaluating service for interested investors who have not affiliated with our investment management and advisory services. This service is affectionally called S.O.S. or Second Opinion Services. Interested investors with a minimum account size of $500,000 can be reviewed for the following objectives.

- **Growth**
- **Balanced**
- **Income Distribution**
- **Capital Preservation**

"In recent months our wealth team has seen a large percentage of portfolios from non-clients with dangerous levels of concentrated stock and market risk," said Kevin Kern co-founder of Advisors Capital Management. "The 10-year economic expansion and stock market growth has too many investors reaching for yield, minimizing their bond allocations or taking undue risk in a handful of growth stocks." Some investors have given up on basic portfolio diversification principals while they reach for either growth or income. Bridgeview's portfolio review provides a second set of eyes on portfolios to remind investors of market volatility and risk vs. reward.

Bridgeview's S.O.S. portfolio review is based on the firm's opinions regarding allocation, valuation, diversification and overall investment choice. Bridgeview will review for any conflicts with the stated objectives provided by the participating investor and then make recommendations based on the firm's forward market and economic guidance. All portfolio reviews will reflect the firm's value-oriented investment philosophy.

INVESTMENT REVIEW

- Investment Selection
- Diversification
- Valuation
- Security Overlap
- Objective Conflicts

MAKING SURE YOUR INVESTMENTS ARE ALIGNED WITH YOUR OBJECTIVES

- **No cost or obligation**
- Unbiased opinions – if things look good, we will say it..
- All we need is a copy of your statement(s) and a few minutes on the phone to review your investment objectives.

QUESTIONS COVERED PRIOR TO YOUR INVESTMENT REVIEW

1. Primary Objectives and Concerns
2. Investment Timeframe
3. Cash Flow Needs
4. Overall Assets

HOW TO GET STARTED

Contact Robb at Robb@BridgeviewWealth.com or 724-940-6321. After a quick phone review of your objectives, you will be provided a secured method to share your investment statements for review.