Flexible Investment Strategies in an Unpredictable Economy

Chicago
Financial

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M. Brown & Associates, Ltd.

"Creating and Preserving Wealth"

It's ironic how sometimes the most successful executives are the least organized when it comes to their personal finances. After years of concentrating on running successful companies, they suddenly find themselves ill-prepared for retirement. Case in point: a certain Chicago business owner whose investments were primarily a mish-mash of equities incompatible with his risk tolerance and goals. He turned to M. Brown & Associates to get his financial house in order.

"He was in a buy-and-hold asset allocation profile with accounts in four places," says Greg Bruno, CFP®. "It was very confusing for him. We consolidated those accounts and matched the risk to the client's profile. Now we manage his accounts in a proactive manner."

From left: Robert J. Mervis, Greg Bruno, Mark Brown, Ron Doweidt, Andy Buttimer

"Many people come to us with holdings that are inappropriate for their circumstances and risk level. It's very satisfying to help them get their investments back in line with their objectives and make their lives easier."

—Mark Brown, CFP®, President

Conventional wisdom urges patience in a bear market, but that is not necessarily the most prudent approach for investors, especially those who are close to retirement, adds Andy Buttimer, senior financial advisor. It can take years to recover from significant losses, and time is simply not a luxury many people can afford.

Financial Planning for Businesses

- Customized Retirement Plans
- Health Insurance / Employee Benefits
- Investment Programs
- Disability
- Long-Term Care insurance
- Deferred Compensation Plans

Financial Planning for Individuals & Families

- Proactive Investment Programs
- Stocks & Bonds
- Mutual Funds
- Insurance Planning (risk management)
- Asset Protection
- Estate Planning
- Tax Planning Strategies

Unlike many financial advisory firms, M. Brown & Associates believes in proactive investment, closely monitoring clients' assets daily and adapting them to changing conditions, rather than waiting until year's end to rebalance. With advisors representing a wide range of professional disciplines, M. Brown & Associates offers a well-orchestrated team approach to portfolio management and retirement planning for investors in the $200,000 to $2 million range, as well as for business clients.

"We have experts in a variety of areas who can get quality answers for clients' questions, including an in-house investment manager with 30 years of experience," says Bob Mervis, CFP®, a senior advisor specializing in taxes. "We have expertise in insurance, tax planning, estate planning and retirement plans."

The firm's advisors include Greg Bruno, CFP®, investment manager; Robert J Mervis, CFP®; Andrew Buttimer, senior financial advisor; Ron Doweidt, a financial advisor specializing in corporate retirement plans; and Mark Brown, CFP® and president.

As an independent boutique firm, M. Brown & Associates sells no proprietary products. It has the freedom to objectively offer investment choices that are cost-effective and most likely to achieve the desired results within a realistic timeframe. Many of the firm's accounts are at higher levels than they were in 2008, before the Wall Street crisis occurred.

M. Brown & Associates represents hundreds of clients, including multiple generations of families. Indeed, the firm's client satisfaction rate is very high, and *Chicago*® magazine honored Mark Brown with a Five Star Wealth Manager Award℠ in 2010.

"Many people come to us with holdings that are inappropriate for their circumstances and risk level, or they simply don't understand what they own or hold," Brown says. "It's very satisfying to help them get their investments back in line with their objectives and make their lives easier."

"Creating and Preserving Wealth"

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