New Perspectives, Inc.

At New Perspectives, personal service is the standard. Whether it's through face-to-face meetings, phone conversations, snail mail or email, our goal is to keep you informed about everything that affects your account. We insist on a personal relationship with each of our clients in order to be more effective money managers.

From the beginning, we develop a financial plan with your personal needs in mind. While we build and track portfolio models, they are just a starting point.

Our Process:

- ✓ Your initial consultation helps us determine your needs, objectives and risk tolerance.
- ✓ We tailor your portfolio and monitor it to ensure it meets your needs.
- ✓ Each quarter, you receive a report detailing positions, transactions and rate of return in your accounts.
- ✓ As long as you are our client, we keep an open line of communication with you. We are always available to assist with other financial or investment matters.

Our Advantages:

- ✓ We consider your whole financial picture and will work with your CPA or Attorney to minimize tax implications and maximize your net worth.
- ✓ We keep a long-term, buy and hold process that reduces trading costs and takes advantage of short-term opportunity.
- ✓ We use very low cost funds, which minimize your cost and maximize your returns.
- ✓ Communication is key to our relationship. We publish a newsletter and regularly update a blog and news feed online.