

EBLINK CREATIVE

BRAND MARKETING

Content Document

List of Pages

Home
About [Company Name]
Why Choose [Company Name]
Performance
*Absolute Return Investment
Our Team
 Our Team > [Name]
 Our Team > [Name]
 Our Team > [Name]
 Our Team > [Name]
Our Services
Testimonials
Contact Us
Privacy Policy
Site Map

Important:

Underlines indicate links, usually to other pages of the site but occasionally to other sections on the same page or to external sites.

Graphics are not added until the design portion of the project. We've included small thumbnail placeholders on the Our Team page to demonstrate how the basic format will appear.

*If Absolute Return Investment will not fit neatly into the navigation, we have been authorized to use Absolute Return Investors instead.

EBLINK CREATIVE

BRAND MARKETING

Home Page

Personal Attention in the Often Impersonal World of Wealth Management

[Company Name] is a privately owned Registered Investment Advisory firm in Houston, Texas, that provides comprehensive financial planning and investment management services. We utilize a values-based approach and invest in all asset classes, including equities, fixed-income, real estate and alternative investments.

> [Learn more about Our Services](#)

[Company Name] was founded upon the belief that personal attention is paramount to success – ours and our clients'. Because we believe that the relationship between our team and our clients is *highly* personal, we place a significant importance on frequent interaction.

> [Learn more About Our Commitment to Personalized Service](#)

At the core of [Company Name] is a team of industry veterans dedicated to providing exceptional service and optimal results. Led by [Name] and [Name], our group has several decades' worth of substantial industry knowledge and in-depth experience that greatly enhances the quality of service we provide.

> [Learn more about Our Team](#)

We embrace a Conservative, Absolute Return Investment philosophy that focuses on maximizing returns. We strive for the highest possible return on your investments, while minimizing risks.

> [Learn more about Absolute Return Investment](#)

Please contact us for more information about our customized and personal conservative investment services. We look forward to working with you.

> [Contact \[Company Name\]](#)

EBLINK CREATIVE

BRAND MARKETING

About [Company Name]

Customized and *Personal* Conservative Investment

[Company Name] was founded by industry veterans [\[Name\]](#) and [\[Name\]](#). United by their desire to offer personal attention in the often impersonal world of wealth management, [Name] and [Name] established [Company Name] in 2008. The unique backgrounds and diverse experience of [Company Name]'s leadership team, along with the company's [Conservative Investment](#) and [Absolute Return](#) strategies, are paramount to the success of the company and its clients.

Personal Attention

Our team is essentially *your team*. By working with [Company Name], you'll receive personalized service from our group of experienced wealth management professionals. We will partner with you to design, implement and manage financial plans specifically tailored to your short-term and long-term goals. [The \[Company Name\] Team](#) will work with you on an ongoing basis to evaluate and modify your wealth plan, when necessary, in response to changes in market conditions or your financial objectives.

> [View our Client Testimonials](#) and [Learn more about Our Team](#)

Conservative Investment Strategy

[Company Name] employs a conservative investment strategy to achieve our clients' financial goals. We strongly believe that excellent long-term investment returns are not only achieved by being fully invested during times of market strength, but also by raising cash or increasing bond exposure to minimize portfolio losses during periods of market weakness. [Our team](#) is dedicated to protecting our clients' portfolios by diversifying assets across multiple asset classes and by actively reallocating portfolios when market conditions change.

> [View our Performance Results](#)

Absolute Return Investment Advisors

[Company Name] employs a [Conservative](#), [Absolute Return Investment](#) philosophy, which focuses on maximizing returns in strong bull markets and minimizing losses in weak bear markets through active asset reallocation. In essence, no matter how volatile markets become, today's actual conditions determine how assets should be allocated among asset classes to achieve above-average long-term [results](#). With this strategy, flexibility is fundamental: we must promptly move investments from one asset class to another *as current market conditions dictate*.

> [Learn more about Absolute Return Investment](#)

EBLINK CREATIVE

BRAND MARKETING

Why Choose [Company Name]

Personalized Wealth Management with Proven Results

While we believe there are many reasons why you should choose [Company Name] as your investment advisor, there are three specific features that differentiate us from our competitors:

Personal Attention

The relationship between our team and our clients is not only important, but also highly personal. Each client is unique, as are their financial goals and aspirations. We therefore emphasize the need for frequent interaction between our team and our clients to ensure critical objectives are understood -- and achieved. Our overall mission is to partner with our clients to create personalized and comprehensive plans to attain short-term and long-term financial and wealth management goals.

> [View our Client Testimonials](#)

Proven Results:

Our excellent track record of impressive results stems from:

- Our dedication to minimizing portfolio losses in times of market weakness
- Our flexibility to invest across all asset classes
- The detailed fundamental analysis we perform on each investment
- Our quick response to changes in market conditions
- Our proprietary company research models
- A significant internal budget, allocated specifically to institutional, unbiased research, not utilized by most Private Client asset management firms

> [View our Performance Results](#)

Our Team:

At the heart of our business is our team. Our group of industry veterans has decades of experience and versatility that significantly enhances the level of service we provide. Our focus on personal long-term relationships with our clients allows us to maintain better communication with them during volatile market periods relative to our counterparts at large institutional banks and asset management firms.

> [Learn more about Our Team](#)

EBLINK CREATIVE

BRAND MARKETING

Performance

No headline.

Barron's Magazine Article on Investment Returns

"Finding Good Stocks in Bad Markets"

By Vito J. Racanelli

August 2, 2010, Barron's

[View Article](#)

[View Graph](#)

[View Comparison to \[Company Name\]'s Returns for Same Periods](#)

[Company Name] Performance

[View Year-to-Date Equity Performance Through September 30, 2010](#)

[View Year-to-Date Bond Performance Through September 30, 2010](#)

[View 2009 Equity Performance](#)

[View 2009 Bond Performance](#)

For eBlink's Reference:

Barron's Magazine Article on Investment Returns

"Finding Good Stocks in Bad Markets"

By Vito J. Racanelli

August 2, 2010, Barron's

[View Article](#) (Investment Returns – Barrons.pdf)

[View Graph](#) (Barrons graph.JPG)

[View Comparison To \[Company Name\]'s Returns for Same Periods](#) (create .pdf: Barrons Comparison 8.2010.xls)

[Company Name] Performance

[View Year-to-Date Equity Performance Through September 30, 2010](#) (rename & create pdf: [Name] Performance rev 9.30.10 for website.xls)

[View Year-to-Date Bond Performance Through September 30, 2010](#) (create pdf: Composite Returns -1.11.10.xls)

[View 2009 Equity Performance](#) (rename & create pdf: [Name] Performance rev 9.30.10 for website.xls)

[View 2009 Bond Performance](#) (create pdf: Composite Returns -1.11.10.xls)

EBLINK CREATIVE

BRAND MARKETING

Absolute Return Investment

Absolute Return Investment Advisors

[Company Name] utilizes an Absolute Return Investment strategy. While all accounts are designed to meet your individual cash flow needs and your specific risk tolerances, we embrace the philosophy that portfolios should be designed to maximize returns during strong bull markets, while minimizing losses and protecting profits during bear markets. Essentially, today's actual market conditions determine how assets should be allocated between all asset classes.

The severe market downturns of 1929, and more recently 2008, demonstrated the need for Absolute Return Investment Strategies. For example, in 2008 the S&P500 declined 37%. In order to make up the 37% loss, investors would have had to achieve a return of over 58% the following year. In 2009, the S&P500 rose by a mere 26%. Therefore, investors would not have regained their losses from the prior year. At [Company Name], we raised cash during the last half of 2008. This cash was subsequently redeployed once market conditions improved. As a result, [Company Name] has delivered above-average returns during this volatile market period.

The benefits of Absolute Return Investment Strategies are clearly demonstrated on the chart below which shows the percentage of growth necessary to offset a loss.

> [Learn More About the Percentage of Growth Necessary to Offset a Loss \(.ppt\)](#)

> [Contact our Absolute Return Advisors Today](#)

EBLINK CREATIVE

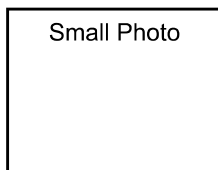
BRAND MARKETING

Our Team

Committed to Our Clients' Financial Success

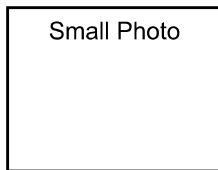
The [Company Name] Wealth Team is a group of experienced and well-respected professionals dedicated to providing exceptional service and optimal results. We adhere to a Code of Ethics and conduct our business with integrity, competence and respect, placing the needs of our clients above all else. Our substantial industry knowledge coupled with the importance we place on personal attention creates a unique quality of service not found at large institutional banks or asset management firms.

The [Company Name] Wealth Team:



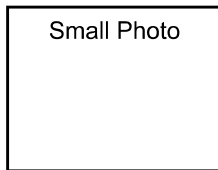
[Name]
President and CEO

[View Profile](#)



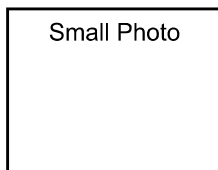
[Name]
Executive Vice President

[View Profile](#)



[Name]
Client Service and Trading Manager

[View Profile](#)



[Name]
Accounting Manager, Analyst and Trader

[View Profile](#)

EBLINK CREATIVE

BRAND MARKETING

Our Team > [Name]

[Name], CFA

Founder, President and CEO

[Name], [Company Name]'s President and CEO, has 25 years of in-depth experience analyzing and managing investments in both equity and fixed-income disciplines. Because of [Name]'s unique background and perspective, she has consistently beaten market benchmark indices throughout her career and has utilized her wealth of knowledge – and knowledge of wealth – to develop proprietary Equity Models to assess risk and return characteristics of various stocks.

While serving as Senior Vice President at JP Morgan Chase for over 15 years, [Name] managed over \$11 billion in fixed-income portfolios, and assisted in managing approximately \$1.6 billion in small cap styles for corporations, endowments, pensions, common trust funds and mutual funds.

After leaving JP Morgan Chase, [Name] became the Chief Investment Strategist at Compass Bank, where she was responsible for overseeing all equity and fixed-income trading, research and asset allocation strategies.

Before founding [Company Name], [Name] served as Regional Investment Manager for Wells Fargo's Houston office. During this time, [Name] was responsible for *more than doubling* her team's assets under management from \$250 million to over \$700 million in a three year period. She also served as a Senior Manager of Wells Fargo's National Equity Buy List Team and managed a team of equity analysts across the country. This team *consistently outperformed* their benchmark indices.

Education:

[Name] earned her CFA designation in 1997 and holds a Bachelor's of Arts degree with majors in Mathematics and Finance from Houston Baptist University. She earned her Master's of Business Administration from the University of Houston with an emphasis in Finance.

EBLINK CREATIVE

BRAND MARKETING

Our Team > [Name]

[Name]

Partner, Executive Vice President

[Name], Co-Founder and Executive Vice President, brings over 25 years of diverse and comprehensive investment experience to the [Company Name] Team. His leadership, lending and relationship management skills were sharply honed throughout his two decades with Wells Fargo, where he served in senior management roles that included:

- Senior Relationship Manager in the Middle Market Lending Group with a portfolio of over \$300 million in loans
- Manager of multiple lenders and support employees as the Head of the Business Banking Group for the entire Houston area
- Manager of 18 lenders and 40 support employees in the establishment and operation of the first statewide Consumer Loan Center
- Manager of lenders and support employees in the workout of 2,000 toxic assets in the Diversified Asset Group

Throughout his career, [Name] has been consistently recognized as a top producer and manager. He brings to [Company Name] an extensive analytical background and thorough understanding of company fundamentals, including cash flow and valuation analysis. By using the knowledge he acquired in lending to large corporations, his skills are now being utilized to find fast growing companies trading at attractive valuations. His expertise is also extremely valuable in analyzing fixed-income securities.

Education

Charles holds a Bachelor's of Business Administration degree with a major in Finance from the University of Houston. He earned his Series 65 designation in 2009.

EBLINK CREATIVE

BRAND MARKETING

Our Team > [Name]

[Name]

Operations Manager

Client Service and Trading Manager

[Name] has almost 20 years of experience in personal and institutional trust management. Before joining [Company Name] as our Operations Manager and Client Services Manager, [Name] was employed with the Personal Trust Services Group at Bank of Texas where she serviced and managed multiple account relationships. While at Bank of Texas, she actively assisted with the management of personal trust accounts valued at over \$850 million. Over the span of 14 years, [Name] held various positions at Compass Bank, including Assistant Relationship Manager, where she focused on institutional assets services and personal wealth management.

Education

[Name] earned her Bachelor's of Arts degree from Texas Tech University, majoring in Telecommunications.

EBLINK CREATIVE

BRAND MARKETING

Our Team > [Name]

[Name]

Accounting Manager, Analyst and Trader

[Name], the newest member of our team, joined [Company Name] Wealth in 2010 to assist with financial analysis of companies, fixed-income and equity trading and accounting. She spent several years in the Petrochemical industry working in accounts receivable and accounting. She has also been employed in the medical field, where she spent a year as a social worker at The Methodist Hospital.

Education

[Name] is currently pursuing enrollment for her Master's of Business Administration, with an emphasis in Finance, at the University of Houston. She holds a Master's of Social Work degree from the University of Houston and a Bachelor's of Art degree from the University of Texas, where she majored in Psychology.

EBLINK CREATIVE

BRAND MARKETING

Our Services

Comprehensive Financial Planning & Investment Management

[Company Name] is a Registered Investment Advisory firm that focuses on comprehensive financial planning and investment management. We use a values-based approach to craft investment plans with appropriate asset allocations tailored specifically to our clients' individual financial needs and aspirations.

[Company Name] invests in all asset classes including:

- Equities
- Fixed-Income
- Real Estate
- Alternative Investments

> [View our Performance Results](#)

We are a fee-only advisor and *do not* receive commissions from selling any investment products. Our fees *do not* include services or fees from third party professionals.

> Learn more about our two core philosophies: [Conservative Investment](#) and [Absolute Return Investment](#).

EBLINK CREATIVE

BRAND MARKETING

Testimonials

[Note to eBlink: use photo of the Howe's for this page and do something to visually emphasize their quote.]

The following are quotes from actual [Company Name] clients:

"My wife and I were so fortunate several years ago to be introduced to [Name]. [Name] is a woman of great integrity with an unbelievable knowledge of the "Market". She absolutely truly loves helping her clients attain their goals. When she decided to begin [Company Name], it was a no-brainer to move our investments with her.

[Name], [Name] [Name] and [Name] make up the heart of [Company Name].. They have proven to be an unbeatable team!

During the past year of economic decline, [Name] and [Name] put their heads together and we are delighted to say they have brought us through with flying colors! They constantly beat the market! My wife and I can now breathe a sigh of relief!

We highly recommend [Name] and [Company Name] to give you peace of mind with your investments."

- Art & Betty Howe

"I worked with [Name] prior to the formation of [Company Name]. It was not a difficult decision to transfer my investments to this highly trained organization. The rationale was based on excellent returns, trust, and the way trends and forecasts are succinctly presented. I enjoy the service of a small company that possesses the technology of a large investment firm. I have never regretted my decision to transfer the family's investments to the [Company Name]."

"[Company Name] is really tuned in to my investment objectives. They have flexibility to respond to the markets as they change, and [Name] and [Name] have the experience, knowledge, integrity, and tools to use this flexibility. I get straight answers with [Company Name], not the party line. And did I say, I like green?"

"The large bank that managed my investments previously had internal limitations on how my account could be managed. My portfolio contained "products" that were more favorable to the bank than to me. There were so many internal rules that they once sat on a \$65,000 deposit for six weeks because it took that long to open an account. This does not happen at [Company Name]!"

"[Company Name] has outperformed my other investments that have a similar mix."

"[[Company Name] provides] clear and concise explanations in simple layman's terms about market conditions, what's happened and why, and what is likely to happen."

"Knowledgeable, professional, and delightful to work with..."

"My questions get answered the first time I ask."

EBLINK CREATIVE

BRAND MARKETING

"[Name] "loves" this stuff."

"A human answers the phone."

"Everyone has been very open and straightforward."

"Absolutely Outstanding!!!"

EBLINK CREATIVE

BRAND MARKETING

Contact Us

Headline

[Company Name]

Address

City, State and Zip Code

(713) 123-1234 phone

(713) 123-1234 fax

[Name]@[Company Name].com

[Google Map will be embedded directly onto the page]

EBLINK CREATIVE

BRAND MARKETING

Privacy Policy

[Company Name] Privacy Policy

The following privacy principles were established to maintain the security, integrity, and confidentiality of your personal financial information.

The type of information we collect:

We routinely collect and retain the information we obtain from account applications you provide to us and from transaction history. This information helps us:

- **To establish and administer your accounts.** (Example: We ask for personally identifying information to protect your accounts from fraud.)
- **To satisfy certain regulatory requirements.** (Example: When you open an account that pays interest, we are required by the IRS to obtain your social security number.)
- **Better understand you so that we may provide you with additional or improved products and services.** (Example: We request information concerning your annual income, annual expenses, and your federal income tax rate).

We do not share our current or previous customers' nonpublic personal information with any affiliate or with non-affiliated third parties except as permitted or required by law.

How is that information protected?

Access to your personal identifiable financial information is limited to employees with a specific business reason for utilizing this data. Our employees are educated about the importance of maintaining confidentiality and customer privacy. If necessary, we take appropriate disciplinary steps to enforce our employee's responsibility to protect your very personal information. In order to prevent unauthorized access to your information, we maintain security standards and procedures that conform to industry practices. These security standards and procedures are routinely tested to verify the integrity of our systems.

EBLINK CREATIVE

BRAND MARKETING

Site Map

Site Map

[\[Company Name\] \(Home\)](#)
[About \[Company Name\]](#)
[Why Choose \[Company Name\]](#)
[Performance](#)
[Absolute Return Investment](#)
[Our Team](#)
 [\[Name\]](#)
 [\[Name\]](#)
 [\[Name\]](#)
 [\[Name\]](#)
[Our Services](#)
[Testimonials](#)
[Contact Us](#)
[Privacy Policy](#)