

INVESTING APPROACH

When it comes to investing you want to consider your strategy for equities.

PASSIVE MANAGEMENT



ACTIVE MANAGEMENT



Replicate the performance of the index.	GOAL	Outperform the index.
Replicate the holdings of an index sometimes holding hundreds of stocks.	PORTFOLIO	Highest conviction stock pick by a manager. Often active funds hold less position than an index.
Strategy can potentially lack downside protection in negative markets.	DOWNSIDE RISK	Managers can potentially protect downside risk in negative markets.
More tax efficient if utilizing long term capital gains.	TAXES	Less tax efficient, attempting for gains before tax consequences
Expense ratios on passive investments are very low.	FEEs	Fees associated with Active Management are higher.
Often ETFs only.	INVESTMENT VEHICLE	Mutual Funds, Stocks, Active ETFs.



Both management strategies can be implemented by the financial advisor to cater the investing plan to the clients' specific financial goals.

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Investment Advisory Services are offered through Kindred Financial LLC, a registered investment adviser.

