



Fixed Income Strategy

Fixed income investments are selected using a rate anticipator style.

Fixed income investments will be taxable or tax-free depending on the client's needs. Typically, investments are made in individual bond issues, ETFs or mutual funds. We typically invest in investment grade bonds, however at times high yield bonds may also be in the portfolio.

Investments are typically made in the following:

ETFs

INDIVIDUAL
BOND
ISSUES

MUTUAL
FUNDS

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