Advanced Portfolio Design, LLC

Wealth Planning Services

It's your wealth; build it, enjoy it, pass it on. Our Wealth Planning Services combine our comprehensive financial planning and our portfolio management services.

Advanced Portfolio Design, LLC is a specialty firm focused on applying leading edge asset allocation planning and high quality investment selection processes with special consideration given to constantly changing tax issues, and changing cash flow needs in retirement.

We work primarily with people whose investment portfolios have reached a "critical mass" where mistakes or lack of proper attention are unacceptable. We also help clients handle difficult or complex financial decisions around the main areas of financial planning. We help people make decisions regarding their entire wealth circumstances, not just their stocks, bonds and bank accounts.

- Comprehensive Financial Planning - including Retirement, Tax, Estate, Insurance, Cash Flow, Education and other goal planning.
- Business Owner Considerations
- Collaborative planning and investment selection
- Portfolio Management
- Customized Asset Allocation Plan
- Quarterly performance reports
- Year end tax planning review
- Online data aggregation
- Cost basis tracking
- We attend meetings with your other advisors (CPA, Atty. Etc.)
- We will work with your extended family (parents, adult children)

How are we different?

- As a fee-only Registered Investment Adviser firm, we are fiduciaries - we do not represent financial or insurance companies, we work for you. Nobody pays us to sell you their investments or insurance. We do not provide advice based on a limited list of products.
- We take the time to listen to you, get to know your needs, and help you learn more about the financial issues that are important to you.

- We go the extra mile to explore advanced tax and investment strategies that may help you do better. It's not enough to use the same old "bag of tricks." We are always looking for new strategies to keep ahead of a quickly changing environment.
- We provide custom portfolio design which integrates your entire financial situation. We also integrate your financial sophistication level, risk tolerance and investment style preferences.

We don't just make plans

We walk you through the implementation and help you get your plans in place.

We will also function as a sort of financial coach to help you coordinate your activities with your other professional advisors.

Our Investment Approach

Advanced Portfolio Design, LLC's investment approach is built on comprehensive financial planning needs.

- Portfolios are custom designed using advanced Asset Allocation modeling software.
- We will use active and passive investment styles. Investments will be screened using relevant statistical data.
- For most clients we prefer to use no-transaction-fee mutual funds and Exchange Traded Funds for the bulk of our clients' portfolio needs. Individual stocks and bonds will be used as client interests require. Options, futures, REITS, limited partnerships, UITs, CDs and annuities may also be considered where appropriate.

- We recommend a strong cash reserve, good personal insurance protection, and commitment to long term goals to ensure our clients' long term success.

For more complete information please ask us for our "General Information and Disclosure Brochure."

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Advanced Portfolio Design, LLC is a Registered Investment Adviser in the states of New Hampshire and Massachusetts.

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