Portfolio Management

Secure Your Financial Future with Our Expert Investment Portfolio Management
Unlock the potential of your wealth and achieve your financial goals with our comprehensive investment portfolio management services.
At TrustBank, we understand that wealth management is not one-size-fits-all. We offer personalized solutions tailored to individual circumstances, risk tolerance, and long-term financial aspirations. Our team of experienced investment professionals will work closely with you to develop a customized investment portfolio that aligns with your unique needs and goals.

Here's how we can help you:

Personalized Investment Planning:

- Initial consultation: $500
- In-depth financial assessment: $1,000
- Development of personalized investment strategy: $2,000
- Ongoing portfolio updates and adjustments: $500/quarter

I. Diversification and Asset Allocation Strategies:

Asset Class	Average Annual Return	Risk Level	Minimum Investment
Stocks	8%	High	$5,000
Bonds	5%	Medium	$5,000
Real Estate	7%	Moderate	$10,000
Alternative Investments	10%	High	$5,000

II. Risk Management and Portfolio Monitoring:

- Portfolio monitoring and performance reports: FREE
- Quarterly risk analysis and adjustments: $250 per quarter
- Access to risk management tools and strategies: included
- Access to a Team of Investment Professionals:
  - Dedicated investment advisor: $1,000 per month
  - Access to a team of investment specialists: FREE
  - Regular portfolio reviews and consultations: FREE

Minimum investment amount to receive personalized portfolio management = $25,000

III. Fees and Charges:

Fee	Description	Annual Rate
Management Fee	1% of assets under management	1%
Performance Fee	20% of annual portfolio gains exceeding 8%	20% (if applicable)

Transaction Fees	Variable depending on asset class and broker	Variable
Account Maintenance Fee	$25 per month	$300 per year

Performance History and Risk Disclosures:
Table 1: Historical Performance

Year	Annual Portfolio Return	Maximum Annual Drawdown
2022	12%	10%
2023	9%	15%

Table 2: Risk Disclosure:

Asset Class	Risk Level	Description
Stocks	High	Potential for high returns but also high volatility.
Bonds	Medium	Stable income but lower potential for growth.
Real Estate	Moderate	Diversification and inflation protection but illiquid investments.
Alternative Investments	High	Access to unique opportunities but complex and often illiquid.

Investment Philosophy and Approach:

- Long-term value investing: Focusing on undervalued assets with strong growth potential.
- Disciplined and research-driven approach: Avoiding short-term trends and focusing on fundamentals.
- Regular portfolio rebalancing to maintain desired asset allocation.
- Transparency in all investment decisions and communication.
- Empowering you to achieve financial independence

Investing in the future can be complex and challenging. At TrustBank, we are committed to making your investment journey smooth and successful. Our expert team will be by your side every step of the way, providing personalized guidance and support to help you achieve your financial goals.
Contact us today to schedule a consultation and learn more about our investment portfolio management services.
Please note: These numbers are for illustrative purposes only and may not be representative of actual results. Please consult with a financial advisor to discuss your specific needs and investment goals