

Investments

As a financial consumer, you have access to a huge variety of potential investments. A big part of our job is to help you choose among them.

Open Source

RJ Wealth Management provides thoughtful research to help you navigate an endless stream of financial noise. We use an “Open Source” investment platform. “Open Source” means that we do not prefer any one company’s products to another, and that we are flexible about how we identify and evaluate investments. It also means that we have no predetermined reasons to recommend one investment over another.



We Choose Investments by Paying Careful Attention To:

- Potential Returns
- Yield
- Risk
- Taxes
- Liquidity
- Cost
- Correlation

Based on your Situation, We Will Recommend a Mix of

- INDIVIDUAL STOCKS

- INDIVIDUAL BONDS

- SEPARATELY MANAGED
ACCOUNTS

- INCOME PRODUCING
SECURITIES

- EXCHANGE TRADED
FUNDS (ETFs)

- FDIC-INSURED BANK
PRODUCTS

- MUTUAL FUNDS

- STRUCTURED PRODUCTS

- TRADITIONAL
ALTERNATIVE
INVESTMENTS

- [INSURANCE AND ANNUITY CONTRACTS](#)

- [LIQUID ALTERNATIVE INVESTMENTS](#)



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