

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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