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

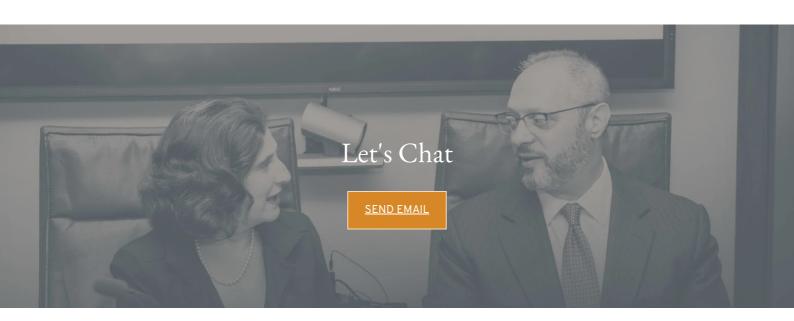
INCOME PRODUCING SECURITIES
FUNDS (ETFS)
FDIC-INSURED BANK PRODUCTS

MUTUAL FUNDS
STRUCTURED PRODUCTS

TRADITIONAL ALTERNATIVE INVESTMENTS

INSURANCE AND ANNUITY CONTRACTS

 LIQUID ALTERNATIVE INVESTMENTS



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<u>Team</u>

Structure

- <u>Fiduciary Standard</u>
- <u>Our Custodians</u>

Services

- Financial Planning
- Executive Compensation
- <u>Insurance</u>
- <u>Lending</u>
- Operational Support

<u>Investments</u>

Resources

- Custodians
- Resources
- <u>Reporting</u>
- <u>Trade Execution</u>
- Trust Services

<u>FAQs</u>

<u>Legal & Privacy</u> <u>Web Accessibility Policy</u>

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