Invest with Ben

Investors who follow a carefully planned set of guidelines have a higher success rate than those who act on their emotions or make frequent changes based on the events of the day. Our investment committee spends the majority of its time researching and writing about how to utilize behavioral finance in concert with the best practices in portfolio management. We have designed an investment approach that allows us to capitalize on the long-term, while not allowing temporary activity in the markets to interfere with our decision-making process.

Two of the central tenets of our investment process are portfolio construction and risk management. We believe that thinking and acting for the long-term is paramount; this idea is at the heart of our client service and portfolio management program. Behavioral counseling, a balanced investment plan and consistent communication are the tools we employ to help our clients utilize “time arbitrage” to their advantage.

While the long-term is the only time frame that truly matters, we recognize that the long-term is not where life is lived. This is why we created a proprietary, low-cost, systematic risk management strategy to ensure that investors can handle periodic volatility without abandoning their investment plan.

With a constant focus on risk management, we’re always looking to balance shorter-term fears with longer-term needs and objectives.

While our investment philosophy and values are universal across all of our client accounts, we understand that each individual plan is personal. This is why providing specific advice and financial planning are at the forefront of everything we do for our clients. Asset management cannot be effectively implemented for an individual or organization without a comprehensive plan in place to address their personal situation.

We serve a wide range of clients and offer a number of different services including:

- Investment Management and Financial Planning for High Net Worth Individuals
- Investment Management and Consulting Services for Institutions and Non-Profits
- Administration and Education for 401(k) and 403(b) Retirement Plans
- A Robo-Advisor Platform for Individual Investors

If you would like to learn more about any of the services we provide or hear more about our firm please click here or send an email to Info-at-RitholtzWealth.com.