

Portfolio Management

Background

- **Started with small monthly investment plan over fifty years ago**
- **My education and entire working career has been associated with business, so I had insights into various equities.**
- **Managed my portfolio until retirement**

Why use a portfolio manager

- **Outside expertise**
- **Change in allocation**
- **Reduce time to manage**

How to select a portfolio manager

- **Interview several with presentations**

How much authority to grant

- **Full trading authority**
- **Trading only with your authorization**

Communications with your manager

- **Visits in your home**
- **Zoom calls have been successful**
- **Monthly reports with graphics**
- **May request broad changes in objectives**
- **Rarely make requests on individual equities**