HIGHVIEW
FINANCIAL GROUP™

Facilitating Excellence in the Management of Wealth™

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Where and why has the concept of loyalty left the wealth management industry? In our decades of experience in this business, we have never seen the degree of uncertainty and confusion that currently permeates the wealth management landscape; and it is not restricted solely to the clients. We are seeing many advisors and advisory firms rethinking their value propositions relative to meeting their clients' needs and expectations.

The historical foundation and future sustainability of the entire Global Wealth Management Industry is based upon earning and keeping the confidence and trust of our investor clients. This trust and confidence has been eroded by our industry as it continued to push ever increasingly sophisticated and complex investment products with the promise of unbelievable returns. The industry further compounded the problem as it moved along the management asset continuum with poorly designed investment portfolios using efficient frontier methodologies that proved to be misaligned with the investor clients' journey in life.

This experience has left investors wanting. They fear for their future and are confused on where to turn to get the solutions that will provide the comfort for which they are searching and the clarity needed to regain their confidence and trust.

Based upon our proven experience, it is our belief that for our Industry to earn back the loyalty and trust that has been lost *will* require us to get **"Back-to-Basics"**. As **Wealth Stewards**, we will have to do three things:

1. Conduct ourselves with a fiduciary mindset.
2. Spend more time understanding the goals, expectations and desires of our investor clients' realities.
3. Deploy objective, comprehensive asset management practices that align with our clients' realities.

The solutions we deliver must provide our clients with the clarity they seek in order for them to be comfortable and confident about their future. This is the only way the loyalty and trust will be reestablished.

Sincerely,

Gary G. Brent

Gary G. Brent
Co-Founder & Chairman
HighView Financial Group