

## West Georgia Wealth: Discretionary Portfolio Management

We believe in taking your emotions out of the investing process. This is why we recommend managing money through a discretionary platform, leaving the day-to-day decisions to us. This allows us to properly adhere to a long-term, disciplined approach in a timely manner. We admire many of the large institutional managers but believe our smaller size can address more nimble trading executions and investment opportunities.

Discretionary investing means:

- You can have the freedom from having to make daily investment decisions.
- Our team can respond nimbly and efficiently to opportunities and risks without waiting for your approval.
- We will prepare a customized Investment Policy Statement (IPS) based on your objectives, comfort and financial situation, to set the guidelines, asset allocation and diversification of your portfolio.
- You have one-on-one access to your Portfolio Manager and team to discuss your needs, so that your portfolio can more accurately reflect your changing individual goals and objectives.

