Abney Associates: Building and Maintaining a Portfolio by Rick Abney

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Once a client chooses an asset allocation that they are comfortable with the assets are then classified. This at first glance appears simple as assets can be split into classes such as equities and bonds.

However, these can be further broken down into sub-categories. A client will then have assets with different levels of risk and return resulting in a dynamic portfolio resistant to sudden market deviations compared to a very restrictive portfolio with one or two asset classes.

Differing market sectors have different effects on equities whether they are acquired on domestic of foreign markets. Bonds can be divided into long and short-term classes along with government issued or corporate bonds each with their own risk tolerance levels.

Maintaining a Portfolio

Our advisors are here to provide the best advice possible when it comes to fine tuning your portfolio. Once you have built a strong and varied portfolio, you will want to maintain it.

Market fluctuations and global events can have an effect a your investments. Your portfolio needs to be flexible enough to accommodate these possible changes.

Abney Associates advisors are here to help our clients quantify each investment and to determine each asset value relative to the portfolio. Balancing a portfolio will help you to understand assets that have been stable to those that have under-performed. Our advisors are there to help you make the correct decisions on balancing your portfolio.

In our experience, we understand that the key to a strong portfolio is diversification. A diversified portfolio is the best option for maintaining steady, long-term growth. It also helps to secure investments from the risk of declines in the global economy during the lifetime of an investment plan.

Abney Associates professionals are responsive, understanding and dynamic. Our professionals are committed to provide the highest levels of services with integrity and the utmost ethical behavior.

We offer a vast array of solutions that we can tailor around a clients goals. We seek to understand a clients financial situation on a one to one basis providing an outstanding service, second to none, based on well researched quality information.

Abney Associates shall do all it can to help build successful enterprises. We look to create superior returns on investment by partnering with the most promising start-ups that have the potential for high growth.

About Abney Associates

We at Abney Associates know how important it is to choose the right financial service to provide comprehensive advice and help to guide you in your investment strategy.

At Abney Associates, we know just how important these decisions are. We understand your ambitions and we want to help you not only reach your goal, but to surpass it and secure you and your familyâ€™s financial future.

It is important that you have the right team working for you to achieve your financial goal in life. We at Abney Associates have a team of dedicated professionals with over 9 years of accumulated knowledge and experience.

Here at Abney Associates we are wholeheartedly committed to bringing the collective knowledge of our team to our clients. For this reason we are extremely particular in our recruitment of precisely the right minds to join our team. Our team of financial advisors understands just how important it is for them to produce the very best that they can for our clients.

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Abney Associates provides a corporate consultation service to our portfolio companies. These services are designed to provide assistance to such start-up an early stage business to help them reach their short-term and long-term goals.

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