

Our Process

WE INVEST IN YOU

At Evermay, we believe wealth management begins with a conversation—an open-ended, ongoing dialogue that defines your particular goals, establishes your priorities and evaluates options based on your liquidity needs, risk tolerance and other factors. The knowledge and insight we acquire from these discussions becomes the foundation of your wealth management program.

DUE DILIGENCE

How do we go about constructing that program? We start with a sturdy framework: a long-term asset allocation strategy that emphasizes diversification and discipline over market timing. Through our open architecture investment platform, we employ a rigorous process for selecting managers, choosing only the most consistent and best performing. We carefully select equities and fixed income investments for their potential to enhance your portfolio performance. We use sophisticated optimization and allocation models to assemble a mix of assets designed to deliver the highest possible return for your particular level of risk. When appropriate, we also offer a variety of alternative investment options, as we seek to enhance your portfolio performance with more consistent returns and reduced volatility.

TRACKING RESULTS

Of course, our due diligence doesn't end there. We continue to track and analyze your portfolio on a regular basis, rebalancing when necessary based on market shifts or your own changing priorities.

By taking the time to explore your unique circumstances, and combining that wisdom with a carefully planned, long-term strategy, we can build a portfolio that addresses your needs and endeavors to strengthen your financial stability.