



WE MANAGE OUR CLIENTS'
MONEY AS OUR OWN

DETALUS ADVISORS
DETALUS SECURITIES (Member FINRA, SIPC)

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Individual clients, families, small businesses, and nonprofit organizations seek our help for many reasons. Here are some common cases that Detalus deals with often, helping clients get on-track:

Market Fears

We have all heard horror stories of peoples' investments being wiped out when the market takes a sudden downturn. The solution is to find ways to hedge one's investments against the market. We use long/short funds and managed futures strategies to help protect against 100% correlation to the markets, providing additional protection against large market downturns.

Scattered, Not Strategic

Many clients come to us with scattered accounts and portfolios slapped together over time. The problem is that none of the investments are working together. The solution is to create a defined strategy with portfolio weighting and objectives to set you on a path towards your goals. Our strategies also include performance reporting and ongoing allocation

adjustments to fully optimize your wealth management.

"What Are My Alternatives?"

Some clients are interested in alternative investments to best drive yield over time and avoid market fluctuations. This can be done with products that are uncorrelated to the marketplace - unrelated to typical equity and fixed income markets. We can advise on an array of such products, educating you on their strengths and weaknesses within your specific portfolio.

Beyond Investments

Investments are just one aspect of wealth management. Clients come to us asking about loans, charitable contributions, trusts, and a host of other needs. The best wealth management includes an array of services, including:

Asset-Based / Non-Purpose Lending Options

We provide access to loans that can be up to 65% of your investment account balance, at competitive interest rates.

Philanthropy Solutions

We offer donor-advised funds whereby clients can create their

own charitable giving vehicle while keeping total control over the management of the funds.

Trust Networks

We offer open architecture programs to help administer and distribute principal and income. We can also help handle custody, accounting, and record-keeping for all types of trusts.

"Where Do I Start?"

We've seen this scenario so many times: prospective clients will sit on cash because they do not know what to do with it or when to act. The first step in becoming educated is realizing that a long-term investment timeframe focuses not on the high or the low, but on the consistent returns in between. The key to consistent returns is consistent investment over time within a specific strategy.

We help many clients who have been "on the bench" by helping identify a target amount of cash to invest and partnering to create a sustainable, comfortable strategy. We also set up investment schedules so that there is always a supply of money doing the work, irrespective of the highs and lows of the market.

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