

PROFESSIONAL INVESTMENT MANAGEMENT

OFFERED BY **NENNI FINANCIAL SERVICES**

Professional investment management is a five-step process which you and Nenni Financial Services work on together. It combines the knowledge and expertise of a diverse team of financial professionals with the sophistication and objectivity of computer portfolio modeling.



First we **DISCOVER** your needs. We start by asking the right questions with interviews and a comprehensive questionnaire. What are your financial goals? What do you earn and spend? How do you feel about risk? Successful investment results start with an understanding of your financial means and goals. Only then can a portfolio be custom tailored to fit your life.



Next, we **EXAMINE** your alternatives and provide you with an Investment Policy Statement to show how your needs can be met. This, and other reports, become the road maps for your personal financial and investment plan.



We then **SELECT** an appropriate mix of investment vehicles based on your unique needs and risk tolerance. Each portfolio is different, but they all follow the Nobel Prize-winning concepts of Modern Portfolio Theory. We design portfolios that endeavor to provide high risk-adjusted returns.



Next, we **IMPLEMENT** your investment plan by purchasing a well-diversified portfolio of mostly mutual funds. There are never any commissions. You are charged an annual Trading & Processing fee between .85 and 1.35 percent of your assets which covers all service, trading, and administrative charges - including advisory and management services.



Finally, we **MONITOR AND MEASURE** your investment strategy and performance on a quarterly basis to help you stay on track. Our goal is to develop a relationship that lasts through your lifetime. During regular meetings, we'll assess your progress and when necessary, make changes in your portfolio.

FEE-BASED MANAGERS ARE GUIDED BY WHAT'S IN YOUR BEST INTEREST

Management fees are based on a percentage of assets managed. At Nenni Financial Services we believe this is in your best interest because your manager is paid for investment management, not on the basis of trading commissions charged to your account. You can be assured your manager's investment decisions are guided by one primary goal — increasing your assets at a rate you're comfortable with.

ADD UP THE FACTS



When many investors add up the time, know-how, and resources required to manage their own investments, they may come up short, especially if:

1. They don't have enough time
 2. They don't have the expertise
 3. They don't effectively manage their resources
 4. And the investment results they achieve don't warrant the amount of work involved.
- If this describes your situation, you should consider professional investment management.



Ask Yourself These Questions:

- Do you often feel you don't have enough time to manage your investments?
- Could your assets be managed more effectively to help meet your financial goals?
- Would you rather have a professional manage your investments to help you achieve your objectives?

"Nenni Financial Services can work with you toward your goal of financial independence through financial planning and professional investment management services.

Services include retirement, estate, education, contingency, and investment portfolio management. We develop and manage individually tailored investment portfolios on a fee basis.

Growth and prosperity can be attributed to an ongoing commitment to providing clients with quality financial services and personal attention.

We help our clients work towards making smart decisions about their money and investments. Let us help you, too!"

Paul Nenni, CPA, RFC
Investment Advisor Representative

NFS | **NENNI
FINANCIAL
SERVICES**

Wildwood Office Park
1064 N. University Blvd.
Middletown, OH 45042-3300
(513) 424-1939 Ext 76
(513) 424-5145 - FAX
(877) 271-9541 - Toll Free

Email: paul@nenni.com

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*Professional Financial Planning and
Investment Portfolio Management*



*Now Is the Time
to Look At*

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