

# UNIQUELY UNBIASED MONEY MANAGEMENT



*“Everyone wants to make a fortune and take no risk, but that’s just not possible. Investing is a process,” explains Sherman Steele of Steele Asset Management. “You don’t buy something today and look for a profit tomorrow.”*

**S**teele practices a long-term approach to investing. As a completely independent money manager, he doesn’t sell products, push insurance or encourage hot stocks. He solely manages money, striving for maximum value while educating clients.

## **Independent, Objective, Unbiased**

Steele’s research comes from independent research firms. He selects the best opportunities and deciphers the right time to buy—not simply investing the day a client hands over money.

“Investing is like a game of chess. You can take as long as you need to contemplate the best move, or you can take a chance and move without thinking. If you’re not thorough, you’re likely to lose,” Steele says. “Choosing funds or stocks is no different.”

Each portfolio under Steele Asset Management is built around a client’s individual goals and personal risk tolerance—and with a big-picture perspective. “Yes, there’s going to be volatility. Yes, there’s going to be risk,” Steele says. “But your annualized long-term returns are going to be better than keeping your money in cash or bonds.”

## **Finding the Best Performers**

When selecting mutual funds, Steele looks for those that are well managed, have a great track record and carry longevity. “There are a lot of great funds out there that aren’t the biggest names,” he says.

With stocks, Steele targets companies with plenty of cash and no debt. Such companies provide security for investors because “they can increase dividends for shareholders, acquire other companies or buy the stock back,” Steele says. “All three scenarios are of value to the investor.”

## **ABOUT SHERMAN STEELE**

**T**he son of a government economist, Sherman Marquis Steele was fascinated by the financial world early on—even learning the price-to-earnings ratio formula by age ten.

His career began as a professional tennis player, and he then served as the Assistant Vice President of Sales for an Aetna subsidiary before founding Steele Asset Management in 1997. His business model links his company’s prosperity to his clients’ success. As an unbiased fiduciary who doesn’t take commissions or sell products, he succeeds only when you do.

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