



INVESTMENT SERVICES  
of America, Inc.

## Simple Philosophy – Blended Portfolios

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### Solutions derived from a simple approach

Our approach to investment management is rooted in a simple philosophy – we align our management approach with your investment objective. Like our clients, we are more interested in consistency of returns, capital preservation, and investment growth than intermittently spectacular returns. To accomplish this end, we blend high quality, sustainable-growth equities with high quality intermediate-term bonds to create a custom investment portfolio designed to meet your specific investment objective.

### Blended Portfolios

If Da Vinci's "*simplicity is the ultimate sophistication*" comment is applied to investing, the result may well be a blended portfolio. A portfolio of high-quality growth stocks blended with high-quality bonds may accommodate both the multi-dimensional investment objectives most investors possess and also be the antidote to the increasingly complex investment world.

#### Managing Multiple Objectives

By the time they have accumulated significant assets, most investors realize they have several investment objectives. While still seeking growth of their nest egg, they are now equally concerned with its preservation. They may also need their portfolio to provide a steady stream of income, either now or in the future. Our blended account approach is designed to meet those multiple investment goals.

#### Simple Sophistication

Also different from what most financial advisors currently prescribe, we believe that effective diversification can be achieved without the complexity and cost that comes with so many investment plans today.

The financial industry continues to add more products and asset classes intended to offer new investment opportunities and less risk from the added diversification. But as we have learned in recent years, during times of financial stress, most of these asset classes tend to behave in similar fashion. Having more "eggs" in a portfolio basket accomplishes little if all the eggs crack during a fall.

#### Our Core Business

The majority of our clients choose our blended account strategy because it is simple, yet effective. It may run contrary to conventional wisdom, but a simple portfolio of high-quality stocks with a variety of market capitalizations that conduct business across the globe, coupled with the right types of bonds can achieve the results sought by many investors today.

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