AdvisorIntelligence

LITMAN GREGORY

We help you navigate the investment landscape for your clients.

INVESTMENT RESEARCH

Independent, fundamental asset class analysis and deep qualitative manager due diligence. We set the bar high in evaluating investment opportunities, undertaking rigorous analysis of long-term drivers of investment performance.

CLIENT COMMUNICATIONS

Through our communications, we seek to instill client confidence in our competence, investment approach, and core values. We share white-labeled materials and redistributable messages to guide your own conversations with clients.

MODEL PORTFOLIOS

Portfolios based on rigorous, independent research and a disciplined process that seeks the highest conviction before enacting any investment decision. Our strategies meet the wide range of objectives, preferences, and financial goals of your clients.

www.advisorintelligence.com | 925.254.8999 | research@advisorintelligence.com

AdvisorIntelligence
LITMAN GREGORY

About Litman Gregory

Co-founded by Ken Gregory and Craig Litman, Litman Gregory is a nationally recognized boutique wealth management firm with 30 years of experience helping clients reach their financial goals. From the start, our mission has been simple: Provide high-caliber financial and investment advice that is conflict-free, without the pressure to sell products or services that can be common in larger institutions.

AdvisorIntelligence

Through AdvisorIntelligence, Litman Gregory shares the proven investment strategies on which we have built our own wealth management business. We share the in-depth proprietary investment research and model portfolios, along with high-quality client materials necessary to deliver advice with confidence.

Whether advisors are coming to us to fully outsource their investment decision-making or as a compliment to their own work, our web-based service allows users to access and implement these materials in a flexible way that meets the unique needs of their practice as they seek to build a scalable and sustainable business.

Investment Approach

We are long-term, patient, fundamental investors with an approach grounded in intensive research paired with a disciplined process. We utilize both to achieve our goal of delivering superior risk-adjusted returns over the long-term for our client portfolios.

The key elements of our approach:

- Global Perspective
- Long-Term Approach
- Forward-Looking Analysis
- Discipline and Conviction
- Innovative Thinking
- Broad Access to Talent

Get instant access to investment research and client communications with a free trial of **AdvisorIntelligence**.

Contact our team for more information on our services

www.advisorintelligence.com | 925.254.8999 | research@advisorintelligence.com