STATERA
ASSET MANAGEMENT

Investment management can prove a constant source of mental anguish. Spirits may lift with each new high or sink on increased fear of potential declines. Knees will shake amidst heightened market volatility, or flex at the chance to invest at market lows. Those contradictions suggest there's some wisdom in, "only if we let it." We believe a successful investment experience is based on understanding the need to achieve the right balance of risk and reward.

Statera seeks to provide that balance.

Our work is bound by a discipline we believe most effectively targets client aspirations. This discipline we believe provides a foundation that nurtures client trust in their Advisor. At Statera, we believe that a methodical approach, respecting more than a century's worth of collective industry knowledge and evolved to be relevant to the investment challenges and opportunities of today, ultimately will enable the firm to serve as much a source of solace as of guidance as we team with advisors in the pursuit of their clients' life goals.

Defining components of our approach:

Core / Whole Portfolio Solutions

We manage a suite of model portfolios for advisors to select for their clients, based on individual tolerances for risk and timelines for meeting investment goals. Each invested across multiple asset classes, the long-term-oriented models are designed to serve as whole- or core-portfolio solutions

Toolkit for Custom Glidepaths

We believe clients who understand their investment plans and tolerances for risk, and who take a balanced approach to managing that risk can enjoy better outcomes in investing. Statera's differentiated approach enables advisors to adjust client portfolios to revised investment plans as life circumstances and emotional tolerances for risk change over time

DFA-Based Models

We construct our models using mutual funds managed by Dimensional Fund Advisors as the means to achieving balanced risk exposures. Known for structuring broadly diversified funds that emphasize characteristics of investments that may lead to outperformance, Dimensional has a long history of applying academic research to practical investing

Statera Asset Management is an extended family of investment professionals and entrepreneurs solely focused on the success of our partner advisors. With deep and still expanding collective experience in the insurance and asset management businesses across a wide range of market and industry environments, the Statera Team seeks to be a stable partner providing investment solutions that foster long-term financial security and emotional serenity. In addition to the pursuit of client financial goals, we further seek to provide practice development support for those advisors that engage clients with a more holistic perspective, unifying services that protect assets with those that seek to preserve and grow them.

Important Information

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Investing in any investment vehicle carries risk, including the possible loss of principal, and there can be no assurance that any investment strategy will provide positive performance over a period of time. The asset classes and/or investment strategies described in this publication may not be suitable for all investors. Investment decisions should be made based on the investor's specific financial needs and objectives, goals, time horizon, tax liability and risk tolerance.

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