



Progressive Strategy Group, LLC

Innovative Solutions for Business & Investment

INVESTMENT ADVISORY BROCHURE

OVERVIEW

PSG is an independent management consultancy and registered investment advisory focused on creating long-term value and capital appreciation for our clients, while maintaining a commitment to the betterment of our community and planet.

INVESTMENT MANAGER

Mr. Robin Smith-Martin is the organization's Managing Director and Investment Manager. Robin directs client strategy for the management consultancy, and is a Registered Investment Advisor with an MBA focused on global business and investment management.

COMMITMENT TO SERVICE

PSG is committed to providing continuous quality service to our clients and partners. This includes regular meetings, clear communications and reporting, and effective portfolio management.

INVESTMENT PHILOSOPHY

At PSG our over-arching philosophy is to live well and do good. This translates into an investment philosophy centered on diversification and long-term appreciation. Furthermore, we seek to place investments in vehicles that are specifically aligned to our clients' common values: community, environment, and cashflow. We believe that most people, when given appropriate consideration, want to improve their communities, reduce their environmental impact, and well . . . make more money.

FEES

PSG is a fee-only investment advisory. The asset-based fee is charged annually and in advance of services rendered.

TYPES OF CLIENTS

PSG primarily works with corporations and high-net worth individuals.

TYPES OF INVESTMENTS

PSG considers a broad range of asset types when developing individual portfolios.

- U.S. Equities and Funds
- International (developed & emerging) Equities and Funds
- U.S. and International Bonds
- Municipal Bonds
- Real Estate
- Alternative Investments

OUR CLIENT APPROACH

We approach each client with a fresh perspective, and apply a thoughtful engagement process to assure the success of your goals and objectives.

INTERVIEW, ANALYSIS & PLANNING

The process begins with a client interview to learn more about you, your values, and your financial goals (both near term and long-term). We also determine your overall financial position and your affinity for risk. This information allows us to develop an investment plan that reflects your future income and portfolio appreciation needs. As your lifestyle and income change, we adapt the plan accordingly.

PORTFOLIO DEVELOPMENT

Once your values and financial goals have been identified and your investment plan developed, we combine various asset classes into a balanced portfolio, taking your risk preferences, tax situation, and lifetime objectives into account.

CONSTANT EVALUATION

We have a constant eye on changes in the market and maintain regular communications with you to determine changes in your personal situation. With this information in hand, we optimize your portfolio to support your future income and portfolio appreciation needs.

ADDITIONAL INFORMATION

For more information please contact us at the address below.