KEEBLE & PYKE

FINANCIAL ADVISORS LLC

Investment Process

At Keeble & Pyke Financial Advisors, with good stewardship being our mission, we embrace a conservative, yet innovative investment philosophy while maintaining vigilance over your assets. We appreciate the hard work and discipline required to develop wealth, and we work every day to both preserve that wealth and help it grow. In an effort to best serve our clients, we have developed a multiple step system to gather client information, recommend the appropriate investments for their investment objectives and risk tolerance, and keep them involved in the process. We undertake a thorough, in-depth process to determine your unique risk tolerance and develop the portfolio around your needs. Our team engages the client in the portfolio development and keeps them involved from the initial meeting through our ongoing annual reviews.

Our Approach

We get to know you…

Through a series of questions known as an Investment Policy Questionnaire, we obtain a first glance into your ability to take risk with your financial assets, and consider your investment objectives and long-term goals. We analyze your comprehensive financial picture including taxes, outside investments, and retirement needs to determine the right fit for you.

We discuss risk/reward…

After reviewing the results provided by you, we engage you in conversation to delve deeper into your understanding of risk/return and volatility, in an effort to ensure your goals can be attained through the allocation selected.

We determine your fit…

To conclude the conversation, we together select a model portfolio that best suits your investor profile, and agree to transition your assets into the identified allocation on the Investor Policy Statement.

We get you invested…

Over time, our team will transition your portfolio into the model selected. The Keeble & Pyke Investment Committee meets regularly to review the models, analyze them given current economic and market conditions, and rebalance the portfolios accordingly.

We watch your portfolio…

We will continue to update and monitor the portfolios and your comfort level with your investments through periodic meetings and communications.

Keeble & Pyke Financial Advisors strives to "*help clients be good stewards of all that has been entrusted to them.*" We believe that our approach serves the client to help reach their goals while keeping them an integral part of the decision-making process. Our team looks forward to serving your investment and financial needs, and developing a lasting relationship for many years to come.