

# GURUN

## INVESTMENT ADVISORS

*Conservative investment management*

**Gurun Investment Advisors** is an independently owned and SEC Registered Investment Advisor incorporated in 1981 to provide customized investment portfolios designed to assist clients achieve their long-term financial objectives in a responsible and conservative manner.

### EXTENSIVE EXPERIENCE

- Six investment professionals with over 125 years combined investment oversight.
- Three Chartered Financial Analysts.
- A strong complement of seasoned managers.
- Background managing financial assets in all market cycles.

### RISK MANAGEMENT

- Low volatility management.
- An emphasis on ensuring suitable asset allocations based on the Client's risk tolerance and investment objectives.
- Diversification by industry and issuer.
- Investment holdings restricted to high quality, established companies with above average growth potential.

### PERSONAL ATTENTION

- Regular communication and personal interface with Clients.
- Customized portfolios to achieve each Client's long-term investment objectives.
- Portfolio rebalancing to incorporate Client lifestyle changes and income needs.

### COST CONSCIOUS

- Tax efficient investment management through tax loss harvesting, matching of gains against losses, and low portfolio turnover.
- Overall goal is to assist in maximizing the net real returns for our Clients by keeping management expenses to a minimum.

### COMPETITIVE FEES

- Attractive fee schedules compared to separately managed portfolios and mutual fund alternatives



GURUN INVESTMENT ADVISORS, INC.

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