

Argent Global Asset Allocation

OVERVIEW

Details:

- Globally diversified, risk-based core portfolios
- Asset class diversification: Large, Small, Mid, International and Emerging markets
- Actively & tactically managed seeking major global asset class opportunities for long-term returns consistent to the risk profile
- Tax-friendly as the portfolio management team actively tax loss harvests
- Low turnover
- Long-term oriented
- We manage both ETF and Mutual Fund versions of globally diversified Equity, Growth, Moderate Plus, Moderate, Conserative, and Bond. These strategies are managed with maximum and minimum tolerance bands for equity and defensive assets.
- We manage a tactical strategy with no tolerance bands and the flexibility to invest in both ETFs and Mutual Funds in the same account.

Account Information:

- Strategy offered as separately managed account

Disclosures

Argent Wealth Management is a group of investment professionals registered with HighTower Securities, LLC, member FINRA and SIPC, and with HighTower Advisors, LLC, a registered investment advisor with the SEC. Securities are offered through HighTower Securities, LLC; advisory services are offered through HighTower Advisors, LLC. This is not an offer to buy or sell securities. No investment process is free of risk, and there is no guarantee that the investment process or the investment opportunities referenced herein will be profitable. Past performance is not indicative of current or future performance and is not a guarantee. The investment opportunities referenced herein may not be suitable for all investors. All data and information reference herein are from sources believed to be reliable. Any opinions, news, research, analyses, prices, or other information contained in this research is provided as general market commentary, it does not constitute investment advice. Argent Wealth Management and HighTower shall not in any way be liable for claims, and make no expressed or implied representations or warranties as to the accuracy or completeness of the data and other information, or for statements or errors contained in or omissions from the obtained data and information referenced herein. The data and information are provided as of the date referenced. Such data and information are subject to change without notice. This document was created for informational purposes only; the opinions expressed are solely those of Argent Wealth Management and do not represent those of HighTower Advisors, LLC, or any of its affiliates.

MANAGERS



David M. Duchesneau

Esq., CPA, CFP®

CHIEF INVESTMENT OFFICER
Portfolio Manager

Matt Ristuccia MBA, CFA
CHIEF INVESTMENT OFFICER
Portfolio Manager



Timothy Duchesneau

INVESTMENT ANALYST
Portfolio Manager

CONTACT

For more information about the strategy:

Joseph E. Finn, Dir. of Bus. Development
781 290-4900 | jfinn@argentwm.com