

ABMM CAPITAL UPDATE

ABMM Capital Portfolios



Since our launch in April of this year, ABMM Capital has taken off! Our structured and thoughtful approach to asset management has been well received by many ABMM Financial affiliated advisors. We currently offer 13 turn key asset management portfolios:

- 6 non-tax managed portfolios for qualified accounts
- 6 tax managed portfolios for non-qualified accounts
- 1 non-tax managed for non-qualified accounts.

Two of our portfolios that have received quite a warm welcome are our **Income Portfolios** for both qualified and non-qualified accounts. With 20% equity exposure, 80% diversified fixed income exposure and a current yield hovering around 3.5% they are a great solution for clients that have cash sitting on the sidelines and who have a 3+ year time horizon, to receive more yield.

TAAV Series- Rolled out earlier this year, these tactical asset allocation portfolios were developed for clients who would traditionally go the “low cost, do it yourself” route. There are three portfolios in the series (Growth, Moderate and Conservative), which are comprised entirely of Vanguard funds. The portfolios are available on the Aspire 403(b) and 457(b) platforms.

For more details on any of the portfolios, contact [Shawn Hanna](#).

Managed Advisory Platform

While we are certainly proud of our turn-key asset management program, we realize that we may not be the best solution for every client. Beyond managing our proprietary portfolios, we are here to assist you with screening other turn key asset managers that are available on the Managed Advisory Platform (MAP) at GWN. There are currently 12 strategists available, in addition to ABMM Capital.



Through one of the money managers on the platform, we can help find the strategy that best fits your clients' needs and objectives. Give us a [call](#) or [email us](#) and we will assist you in choosing the appropriate MAP strategist to meet your clients investment goals.

The ABMM Capital team can also provide an analysis of your client's current investment portfolios, client portfolio proposals for use during the sales process, assistance with the paperwork process and much more.

Insurance

Every good financial plan and investment program needs insurance to make it complete. We are available to assist you with any life, disability or long term care insurance cases you come across. Through our strategic partnership with Madison Brokerage we are able to provide you with a solution to fit almost any insurance need your clients may have.



Did you know that September is Life Insurance Awareness month? Not many people do. LIMRA has developed a variety of publications, blogs, podcast and infographics to help advisors, like yourself, help your clients. Check out the link to the webpage they have developed with all this great information. <http://www.limra.com/liam/>

Sales Idea- Simple and Quick

Ask this simple question of every client that you speak to and you are bound to see an increase in you your life insurance sales and potentially other types of insurance sales as well. *“When was the last time you had an insurance audit done on your family’s life insurance portfolio?”* The answer will most likely be never, which will open the door to an insurance sale opportunity. The truth is that many people are either not insured or are underinsured. By asking this simple question you will be able to start a conversation that could lead to a life insurance sale, a disability insurance sale or a long term care insurance sale. It will also further cement your position with your client as their trusted advisor for all things financial. Remember, if you don’t talk to your client about insurance, someone else will. Leaving that door open to the competition could potentially jeopardize your relationship with your client. Close the door and ask the question. Please [call Shawn Hanna](#) with any questions or for help on any insurance case.

“Insurance is something that everybody needs that must be sold to everybody who needs it”