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AN INDUSTRY-WIDE LEADER

An independent financial advisory firm, Dash Investments is a leading provider of comprehensive wealth management services for both private and institutional investors throughout the country.

Distinguished by a record of outperformance, as well as a cost effective and transparent fee basis, the firm has been selected as a leading financial services provider known throughout the nation for offering excellent value, superior service and high-level market insight.

In an independently-conducted evaluation and comparison of leading firms with an audited track record of at least ten years, Dash Investments was found to have outperformed 90% of the country's investment management firms over the last decade, while employing a highly conservative strategy. As was the case with almost all other financial advisory firms, the company suffered a down year in 2008 at the hands of the financial crisis. However, even in turbulent times, the firm has performed above the level of its peers and has maintained a client retention rate of nearly 100% since inception.

The company's primary focus is on value- and safety-based strategies. The firm's executive investment committee holds optimistic but tempered expectations for the future, with forecasted returns of 6% to 8% over the coming years.

Among the many factors examined in our evaluation were overall performance, client retention, volatility/risk, tax management and cost efficiency. Dash Investments ranked very high across the board on all of these factors.

In order to provide comprehensive and accurate information, our analysis of fees took into account not only the annual fees charged by other firms

for their advisory services, but also the additional fees and hidden costs attached to the various financial products endorsed and sold by advisory firms, such as mutual funds and other investment strategies.

This study proved highly enlightening, offering insight into the sometimes-staggering layers of fees that retail portfolios are often unwittingly subjected to. While many firms appeared on the surface to offer a low fee basis for financial management services, a deeper look revealed that this was not always the case. The largest offenders were those employing fund management strategies, or, in other words, selling their clients into mutual funds and ETFs. Despite their reputation as cost effective tools for diversifying exposure, these products come with their own complex system of fees. In many cases, investors believed they were paying a reasonable 1% for investment management services when in actuality their gross fee basis was running as high as 2.5% - 3.5% per year.

Extending our analysis into the tax management side revealed still more to be concerned about. Not surprisingly, it was those same firms operating on a middleman model that jumped out at us most. Apart from accruing additional fees, these firms were found to be subjecting their clients' portfolios to the high turnover ratios common in mutual funds (80% on average), with attendant tax implications and transaction costs.

By keeping turnover to a very low 10%, Dash Investments' clients pay as much as 70% less in taxes as compared to the average advisor. By



Dash Investments Founder & CEO, Jonathan Dash

also employing a direct management model that does not subject client funds to additional layers of fees, Dash Investments has established itself as a leader, not only in performance but also cost efficiency.

With expert in-house research backing a proven and replicable value-based strategy, the firm has not only outperformed 90% of investment firms but has done so using safe and secure strategies. The firm's decade-long track record of high-quality investment selection and conservative growth is testament to the quality of management and expertise the company offers.

Dash Investments was found to offer excellent value for private investors seeking proven, conservative investment strategies, tailored portfolio creation and active management. With a record of excellent performance over the past decade, the firm has cemented itself among America's financial leaders. 