

Ask Abby

Q: HOW CAN I PICK A WINNER?

Fall is one of my favorite times in the Bluegrass, and part of that excitement includes a trip (or two, or three) to Keeneland. Do you have any financial strategies on how to pick a winner at the track? It's definitely more fun than traditional investing in my book!

— Betting Ben



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A:

HI BEN:

You are right – I love this time of year in Kentucky too! I also enjoy picking a winner at Keeneland and over the years I've looked at everything from horse color to jockey and past races to weather. Oftentimes I change my approach during the day and have never been able to make sense of what "works".

Fortunately, there is a winning strategy when it comes to investment portfolios! At American Trust Wealth, we follow a prudent process that looks at a host of criteria: capital market forecasts, asset quality, low costs, track record, and much more. While the randomness of horse racing outcomes can be frustrating, a prudent process for portfolio construction and monitoring can help to deliver long-term positive results.

It's always fun to hit the long shots, but they seem to lose more often than not. You don't want to come up short down the final stretch of your financial goals. That's why we take a goals-based approach to investing, focusing on providing our clients with the smoothest ride to the finish line.

—Abby V.

American Trust Wealth, headquartered in Lexington, KY, has a legal duty of dedication to clients and follows industry best practices, so that you can rest assured knowing that your goals will always be our goals.

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