Corbett Road Wealth Management

Leading Wealth Management Firm Integrates Original Research with Active Portfolio Management

Conventional wisdom is often wrong. Long-held beliefs can be especially hard to ignore.

Corbett Road takes a unique tactical approach to managing wealth. "Our clients have amassed a great deal of wealth and want to participate in market returns. More importantly, they want to mitigate losses to the extent possible. Tactical asset management allows us to manage money accordingly," says Scott Airey, CFP, who founded both Corbett Road Wealth Management and Corbett Road Investment Management.

The firm's proprietary research vehicle, MACROCAST™, is driven by data taken from six categories: Valuation, Inflation, Technical analysis, Aggregate economy, Liquidity and Sentiment (VITALS). Among the VITALS, Corbett Road assesses, classifies, and aggregates several underlying indicators, enabling their wealth managers to better recognize when market conditions are favorable or unfavorable for risk assets. In turn, a client's investments can be positioned proactively into any company size, industry, sector, or geographical location. Corbett Road combines this process with a strong sell discipline to help mitigate clients' exposure to losses in the market.

Corbett Road's Smart Tactical™ and MYPATH Asset Allocation Portfolios™ allows wealth managers to tailor solutions that cater specifically to a clients' financial situations and investment preferences (i.e. individual stocks vs. ETFs, aggressive vs. defensive, etc.). "As a result, clients have the confidence to stay disciplined during volatile periods in the market, knowing that someone is actively working on their behalf," adds Airey.

The seamless integration of its proprietary investment approach with a customized financial planning process (MILESTONE™), makes Corbett Road a rarity in the industry. The MILESTONE™ process allows clients to prioritize different aspects of their financial picture that have the greatest impact. Instead of placing an emphasis on accomplishing a broad-based goal, clients focus on achieving distinct financial milestones throughout their lives. "By looking at each of these milestones individually, we find our clients are typically more engaged throughout the process, more aware of their overall financial picture, and have higher success rates in transforming wishes into realities," explains Corbett Road Senior Vice President Jeffrey McCoy.

Corbett Road Wealth Management is led by a team of veteran professionals with decades of experience. Team members hold credentials such as Chartered Financial Analyst® (CFA), Certified Financial Planner™ (CFP), Chartered Financial Consultant® (ChFC), Accredited Asset Management Specialist (AAMS), and several FINRA licenses.

"We've experienced tremendous growth. Our staff works very hard to maintain a boutique experience for our clients," says Airey. "Personal, hands-on attention from senior level staff is one old tradition that will never become outdated."

CORBETT ROAD

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MACROCAST™