



(l to r) Fred Sweers, Shallon Weis, James Tausz, Marty Schimp

By Sara Martin

# Managing and Targeting Investments



**DAILY, PROACTIVE MANAGEMENT OF SECURITIES BY EXPERIENCED, INDEPENDENT ADVISORS FOR TRULY CUSTOMIZED WEALTH MANAGEMENT.**

**T**iming is everything in the investment world. Knowing when to buy and when to sell is complicated, especially when emotions run high or when investors approach a major life change, such as sending a child to college or entering retirement.

Helping investors navigate these ever-changing waters is Bradford Financial Center, helmed by President James W. Tausz, CFP®, AIF® and Financial Advisors Marty Schimp, CRPS®; Shallon Weis, CFP®, AIF®; and Fred Sweers.

“We are a full-service financial planning firm in Iowa,” says Tausz.

“We take a complete, all-encompassing approach to managing our clients’ wealth journey,” says Weis. “It’s not about products; it’s about delivering personalized service that uniquely fits our clients’ needs.”

## EYES ON YOUR FINANCIAL FUTURE

“For decades, we’ve used a proprietary program called Watch and Manage™ to help clients gain an opportunity for higher returns when the markets go up and to help mitigate losses when the market goes down,” says Tausz.

The Watch and Manage program provides daily monitoring of clients’ investments so response to subtle changes in the market can be quick. When a certain number of 10-12 key areas of a security are underperforming, the managers may withdraw funds. If a certain number of areas are growing, the managers may review to see if additional deposits should be made. Stop-loss orders are placed on each security and are adjusted to capture gains.\*

“There are positive and negative changes occurring all the time,” notes Tausz. “The reason people often don’t do well in the market is because they don’t get out when they should.”

As a Registered Investment Advisor, Bradford doesn’t charge clients commission, only a quarterly management fee. Advisory fees are tax-deductible if drawn from nonqualified accounts, should clients itemize, and are not taxed if withdrawn from an IRA or qualified account.

Securities are recommended based on clients’ risk tolerance, and extensive research is conducted on each security before moving assets in or out. Clients can watch their holdings daily online and receive third-party-generated quarterly reports to stay informed.

“Clients place their worries on our shoulders, and our team is second to none at helping them get to where they want to go,” says Tausz. “This program is always evolving, just as we are. We keep our eyes peeled for the newest innovations and services to keep Bradford viable for the present and for years to come.”

*\*Stop prices are not execution prices. Stop orders may be triggered by a short-lived, dramatic price change.*



**Bradford Financial Center**

*Managing your wealth journey*

**Bradford Financial Center** is located at 215 North Main Street in Clarion, IA, and serves clients in 46 states. For more information, call **800-348-4419** or visit **bradfordfinancialcenter.com**.

**Fred Sweers** is located at 200 Moorehead Avenue in Ida Grove, IA. For more information, call **712-364-3140** or visit **fredsweers.com**.

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