



Longview "INSIGHTS" Newsletter

"helping clients grow, protect and distribute their wealth"



This is a report published by Keith Tufte, President of Longview Wealth Management, LLC with insights on investing and wealth management. This month's investment letter is written by John O'Connor, an associate of mine at Cherry Tree Companies.



March 2015

OUR COMMITMENT TO CLIENTS

1. We will act in your best interests. You can always trust us 100%.
2. We will remain independent and objective. We are not paid a commission on any investment products.
3. We care about you and your family. We are good listeners.
4. We will communicate with you regularly, so you know what we are thinking, and the reasons for any changes in your portfolio. There will be no surprises.
5. We will work hard on your behalf. We will monitor your portfolio frequently and carefully.
6. We will only invest your money into investments that we own ourselves personally, or would own for our own families. We eat our own cooking when it comes to investments.
7. Your investments will primarily be low cost, tax efficient, liquid, simple and transparent.
8. We will keep the risk of your portfolio consistent and appropriate for you.
9. We will keep your portfolio very diversified.
10. We take our job very seriously. For most of our clients we are responsible for their entire life savings, a huge responsibility we take very seriously.
11. We strive to help you reach all your financial and life goals. We are focused on long-term returns and helping you reach your long-term goals, not maximizing short-term returns.
12. We will strive to generate the best returns for you that we can over time, given the returns available in the markets and your risk targets.
13. We are focused on preventing big losses and mistakes in your portfolio (risk), as much as we are trying to maximize your returns. When in doubt, we will err on the side of being conservative.
14. We will try to help you and your family in any way that we can, with anything that has to do with money and finance. We love what we do for a living

THINGS WE CAN'T AND DON'T PROMISE TO CLIENTS

1. We do not promise your returns will beat any certain number (like 10% per year, or beat the general US stock market index (S&P 500 index). We are more focused on being diversified and reaching our clients long-term goals with the least amount of risk.
2. We do not promise your portfolio will not lose money in a market downturn (it will likely decline too). We cannot successfully and consistently "time the market", and neither can anyone else.
3. We do not promise our investment strategy will be exciting. We do not have "hot" stocks or funds with great stories. Our strategy is fairly boring actually, but we believe it provides the best odds for helping you successfully reach your goals.

LONGVIEW WEALTH MANAGEMENT, LLC

Keith N Tufte, President, CFA, MBA • keith@longviewwealth.com • Office (952) 906-1289 • Cell (952) 465-1785

Legal Disclaimer: These materials do not constitute an offer or recommendation to buy or sell any securities or instruments or to participate in any particular investment or trading strategy. They are for informational purposes only. Longview gathers its data from sources it considers reliable. However, Longview makes no express or implied warranties regarding the accuracy of this information or any opinions expressed by the author and may update or change them without prior notification.