Investment Management

A well-balanced portfolio is the foundation of successful investing. Through strategic asset allocation and portfolio diversification, we help you manage risk, navigate market volatility, and position your investments to meet both your short and long-term objectives.

Strategic Asset Allocation

- Customized Structure
- Proactive Rebalancing
- Time Horizon
- Core & Satellite

Tax Efficient Investing

- Tax-Loss Harvesting
- Holding Periods
- Asset Location
- Embedded Gains

Risk Management

- Rules-Based Oversight
- Fully Managed
- Active Monitoring
- Automated Execution

Merrimack Wealth Management