Investment Management

Solutions from PMA

Making investment decisions can be difficult. What mix of investments makes sense for your objectives and risk tolerance: growth stocks, value stocks, international stocks and tax-free or taxable bonds? This decesion will be much easier when you work with a firm that you trust. There are many financial advisors vying for the privilege of managing your money. Which one is right for you?

- Personal Service by experienced professionals
- Fee-based investment advice
- Disciplined, integrated planning approach
- Vast scope of investment choices
- Access to institutional portfolio money managers
- Sophisticated planning tools & techniques
- Quarterly performance reporting

An Integrated Approach to Wealth Management

Investment management is a complex, time-consuming process, made more difficult by market variables. Many investment managers specialize only in stock, bond and mutual fund sales and do not integrate their recommendation with those of your other financial advisors.

Parikh, Mehta & Associates (PMA) is different. Our financial planning and investment management solutions are components of your overall financial plan. PMA's approach to planning is simple: integration of your financial objectives with conservative tax planning and astute risk management.

Fee-based investment advice

Our financial planning / portfolio management service fees are based on the assets we manage, not on commissions generated by trades. Our goal is not to generate trades but to achieve your goals.

Disciplined, Integrated Planning Approach

Our approach focuses on taking disciplined steps to understand your goals, develop an investment strategy, execute that strategy and then monitor it. Our systematic process includes working with you to:

Your Questions ... Our Expertise

- What are your investment goals: retirement security, second home, philanthropy, education for your children or grandchildren?
- What type of investments should you have: individual stocks, bonds, mutual finds etc.?
- What tolerance do you have for market, inflation or credit risk?
- Are your investments coordinated to achieve your investment goals?

Parikh Mehta & Associates
22632 Golden Springs Dr. #110
Diamond Bar, CA 91765

Phone: 909.861.8100
Fax: 909.861.8177

www.pmaadvisors.com

PMA

Wealth & Tax Advisors

"We are passionate about helping our clients' families achieve their financial goals. Their success is our success. The ultimate satisfaction is helping our clients reach their goals, and subsequently distributing their accumulated wealth to future generations and into their communities."

- Sagar K. Parikh, General Partner
Parikh Mehta & Associates

- Understand your financial objectives
- Plan your asset allocation
- Develop an investment policy to guide us as we help manage your portfolio
- Select your investments
- Measure your portfolios performance each quarter

Scope of Investment Choices

Your scope of investment choices will be nearly limitless. We can utilize individual stocks and U.S. Treasury, corporate or municipal bonds, plus institutional portfolio managers and no-load mutual funds.

In addition to a wide variety of investment choices, we provide you several options in managing these choices. Portfolios which are managed in-house are focused on minimizing risk and maximizing tax efficiency. These portfolios are comprised of large investment grade company stocks and AA-AAA rated bonds along with those securities you may desire to hold because of low-cost basis or for other reasons.

In addition to our in-house management, PMA has access to over 70 institutional portfolio managers and hundreds of mutual funds that are screened for quantitative and qualitative factors. We look at numerous factors, including the manager's performance against peer groups, benchmarks along with their relative tax efficiency and expenses.

Whether you hold stocks and a few bonds, all mutual funds or we utilize institutional portfolio managers, our role is to understand your investment objectives and risk tolerance and construct a portfolio management strategy that fits them.

Up-to-Date Tools

We use sophisticated financial planning techniques and investment research tools that factor in different strategies and current income and estate tax regulations.

Quarterly Performance Reporting

To assist you in understanding your entire financial picture, you will receive quarterly performance reports on investment accounts we manage for you. The reports give you a breakdown of your portfolio's asset allocation and total performance.

PMA

Wealth & Tax Advisors

The PMA Difference

Investments are an important component of your wealth-management plans. PMA provides investment management solutions that integrate with the other components of your wealth: insurance, retirement plan, taxes, gift & estate, etc. This integration takes you beyond your numbers to provide real understanding of your total wealth. That's the difference between investment advice from PMA and other brokers and traders.

We are committed to providing you unmatched client service and a disciplined delivery of solutions to your management and financial needs. All while staying true to the foundation of trust and ethics this firm was built upon over 30 years ago.

Contact us today.

Sagar K. Parikh, Financial Advisor
sparikh@pmaadvisors.com
(909) 861-8100