



Investment Management

Like engineers building bridges, Natoma Wealth Group helps you span investment and financial obstacles to get you from where you are today to where you want to be in the future.

We create completely custom financial blueprints by taking the time to understand your needs, your goals, and most importantly, you. We go beyond mere portfolio construction by maintaining your plan's accuracy with up-to-date market insights and constant communication. Our investment process is guided by multiple sources of independent research and comprehensive due diligence. In addition to laying the foundation for your investment portfolio, we support your investments with acute asset allocation, aligned with your goals and risk tolerance.

Portfolio Construction

HOLISTIC APPROACH

As fiduciaries, we consider your entire situation before making investment decisions. Having a complete understanding of your balance sheet and current assets is a crucial component to portfolio construction.

CUSTOMIZATION

With planning as the foundation of our investment process, we take both strategic and tactical allocations into consideration when building diversified portfolios by using a mix of stocks, bonds, cash, and alternative investments.

RISK MANAGEMENT

We believe that managing risk is just as important as seeking return. By using effective diversification, our goal is to provide the greatest potential return for the desired level of risk.

ASSET ALLOCATION

One of the most important steps in portfolio construction is setting the proper asset allocation or blend of equity and fixed income. We determine this with care and in context with your investment goals and personal risk tolerance.

TAX EFFICIENT

An objective of portfolio management is to minimize the tax impact to you, as the investor. Our goal is to deliver consistent risk exposure based on your situation while maximizing after tax returns.

We are committed to providing you with an investment structure that fits your timeline and helps furnish you with a clear passage to your financial destination.