OUR PROCESS

Whether we are using our unique Delaware discretionary portfolios, hiring the very best independent investment managers or creating custom accounts for you, we believe active management is necessary to achieve the best results and to help protect your capital." – *Richard Nemeth*

A three-pillar approach to portfolio management

Advisor Managed Accounts (AMA)	Investment Consulting Service™ (ICS)	Custom Accounts (CA)
• Three unique portfolios exclusive to Nemeth Investment Group • Transparent performance data and fees • Extensive support from a specialized team	• Receive comprehensive guidance in selecting the highest standard of investment managers to look after your money • We adhere to strict due diligence when selecting external investment managers	• Manage your own investments with the help of our professional team • These accounts provide cost effective strategies that combine well with AMA and ICS services

Advisor Managed Account Portfolios

Our Advisor Managed Account program relieves you from the day-to-day management of your investments. It also allows us to provide you with open communication and frequent performance updates.

- Three unique portfolios exclusive to Nemeth Investment Group
- Transparent performance data and fees
- Extensive support from a specialized team

In 2012, we launched three AMA portfolios.

- Delaware Income Portfolio (DIP) focuses on dividend paying securities with long-term growth prospects
- Delaware Strategic Balanced Portfolio (DSBP) offers a more active asset allocation strategy, altering its weightings based on changing market conditions
- Delaware Global All-Cap Growth Portfolio (DGGP) focuses on equities within a global boundary that will provide capital appreciation

Using a combination of these three portfolios, along with our other options, an investment strategy can be designed to meet the needs of almost any individual or business.

Investment Consulting Service

CIBC Wood Gundy Investment Consulting Service is your gateway to institutional-quality service, opening the door to investment managers from around the world. This service combines the expertise of Nemeth Investment Group and the objective guidance and monitoring of many professionals on the investment management research team. With thousands of professional investment management firms worldwide, the tasks of finding and hiring is complex. Our strict due diligence and ongoing monitoring helps to ensure your selected investment managers continue to meet our high standards to create a portfolio that suits your individual objectives.

Custom Accounts

Often, clients already have holdings in mutual funds and high-quality securities and would like to participate in the investment management process. A custom account is likely the best solution for this. Nemeth Investment Group has hands-on knowledge of individual securities and portfolio construction. A common practice in the industry is to deviate from focusing on individual securities, due to risk and increased administration and compliance. When executed properly, we feel that this is a cost-effective strategy that combines nicely with our AMA and ICS services. We welcome you to be part of our wealth management process.

Playing the long game

We believe that your investments should be both long-term focused and transparently managed. The Nemeth Investment Group team works directly with your accountants, lawyers and other professionals, to give you a streamlined, worry-free investment experience to meet your goals. Through a custom approach, we can satisfy the diverse and unique needs of our clients.

Using our combined 47 years of experience, coupled with a rigorous research process, we can identify strong firms both quantitatively and qualitatively, that we believe will provide income and long-term growth. We can provide you with a suitable asset mix to maximize performance and minimize downside risk and to maneuver within your objective, while taking advantage of market fluctuations.

You deserve a unique personalized investment strategy. We aim to develop a personal relationship with each of our clients through face-to-face meetings which allow us to understand your personal situations, life goals and financial needs. We provide information to keep you up to date such as quarterly newsletters and knowledge sessions. We use multiple sources for our research and are constantly looking for better information.

A relationship with your Wealth Advisor is rooted in understanding, trust and compassion. They must understand your financial and personal goals before a complete wealth creation strategy can be established.

Contact us

Richard J. Nemeth
Senior Portfolio Manager, Wealth Advisor
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Richard has over 37 years of experience in the investment industry and managing wealth for both individuals and businesses. He holds a Bachelor of Arts in Economics from Western University and a Business Administration Diploma from Wilfrid Laurier University.

Outside of work, Richard enjoys the outdoors and sports, including cycling, hockey and boating. He loves to spend time at the cottage with his family in Long Point. He supports charitable organization including environmental habitat groups.

Richard is connected to the Western Mustang football team through coaching the offensive line and providing mentorship on and off the field. Richard had a successful CFL career playing left tackle for the Winnipeg Blue Bombers highlighted by winning the Grey Cup in 1984.

Michelle L. Nemeth
Administrative Assistant
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With over 10 years of experience working as an Administrative Assistant with Richard, Michelle has strong experience creating and implementing marketing packages, providing excellent customer service for clients and managing the team's social media. She obtained her Bachelor of Arts degree in Digital Media and Journalism from Wilfrid Laurier University and her diploma and post-graduate certificate from Conestoga College. She is currently pursuing her master's degree at Western University.

When Michelle is not working, she enjoys hiking with her two dogs, travelling, playing the violin and spending time at her family cottage in Long Point.

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