

## 3 Benefits Of Using An Investment Management Team

Many people are interested in investing a portion of their savings in order to receive higher financial returns, but they are intimidated by the complexity of today's markets.

*Jeff Horner, SVP,  
Wealth Strategist -  
CFP, CPWA*

Successful investing requires the creative use of sophisticated information, techniques, and tools that are generally not available to the average investor. Managing investments has become a full-time job, demanding a high degree of discipline to evaluate and interpret the multitude of intricate influences that shape the market.

One way concerned investors have been able to secure professional, personal investment advice is through an investment management team. Following are three benefits of utilizing the expertise of an investment management team to build your investment portfolio.

### Full attention to your investments

Investors often want to do things their own way when it comes to financial and asset management because they feel nobody else will be as focused on their results. However, an investment management team has a reputation to protect, and their success relies on delivering not only performance, but trusted guidance tailored to their clients' needs. By seeking out a reputable team and working closely with them, you can ensure that you receive the level of service you require.

Professional investment managers will monitor your investments regularly and take advantage of their contacts, information sources, access to investment opportunities, skill, and experience to grow your wealth steadily over time rather than chasing short-term gains. In times of market uncertainty, having a professional investment manager can provide stable returns, sound advice, and valuable peace of mind.

### Advanced reporting and automation

Progress in technology has fundamentally altered the process and science of investment management. Today, successful investing requires full-time research and data analysis to provide growth of capital while protecting against recurring periods of volatility.

To conduct the necessary research, investment management teams utilize state-of-the-art technology platforms that provide efficient, and wide-ranging data aggregation and analysis. Effective industry analysis requires in-depth considerations of a variety of factors, such as sales trends, earnings fluctuations, price-earnings ratios, dividends, working capital, order trends, and social, political, international, and regulatory influences. With the help of this comprehensive analysis, the team receives sophisticated statistical comparisons that would not be possible without the help of the advanced reporting and analytics tools available to them.

## Strategies unavailable to the common investor

With their years of experience and in-depth knowledge of the markets, investment management teams can construct a customized plan to manage your assets based on your goals, needs, and professional and personal circumstances.

Successful investing is based on a foundation of philosophies and strategies that have stood the test of time. Decisions developed within the framework of reliable research programs can offer the best opportunities for capital preservation and growth. Our experience at PlainsCapital Bank has shown that capital growth is best achieved through a prudent, diversified, tax-sensitive investment approach that emphasizes steady gains.

With a well-designed strategy, an investment management team can broaden your portfolio beyond what you would likely be able to achieve on your own.

## Crafting a successful investment portfolio with an investment management team

An effective investment management team can provide the tools, experience, and expertise to help you [build a diversified portfolio](#) to achieve your financial goals. For more information on how The Private Bank team at PlainsCapital Bank can help protect and build your wealth, contact a specialist today at 866.303.0557.