



CONFLUENT

Asset Management

**Finding New Paths to
Create Real Wealth**



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OUR FIRM

At Confluent Asset Management, our financial advisors are dedicated to creating real, long-term wealth for every client. We build fully customized portfolios for every client to meet their unique needs. Our strategic investment process allows us to approach each client's financial goals individually and provide the most beneficial path, no matter their needs.

OUR APPROACH

Minimize

When market and macro risks are elevated, the first priority is protection. We don't leave your portfolio exposed. Instead, we gradually scale back investments to cash, safeguarding your assets from unpredictable downturns while remaining flexible for future opportunities.

Stabilize

When market indicators send conflicting signals, we manage your portfolio's Beta (measure of risk relative to the market) to find a sweet spot between growth and protection. This helps capture upside gains while minimizing exposure to unexpected drops.

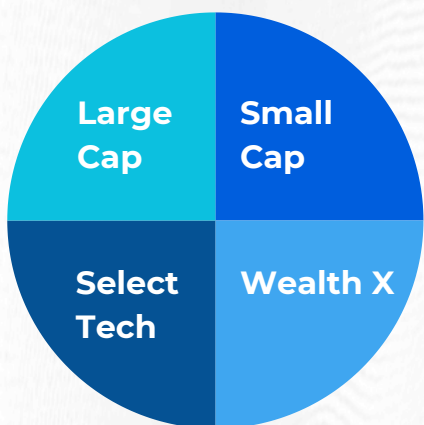
Capitalize

When signals are green, it's time to act. Our Alpha Maximization approach ensures that your portfolio is fully aligned to capture the market's full upside potential. With a proactive stance and precision timing, we position your investments to achieve max growth.

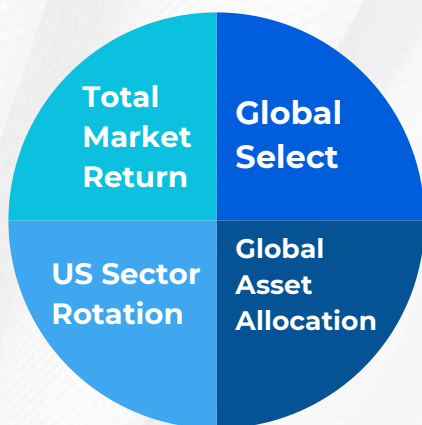
OUR PRODUCTS

Confluent offers tailored solutions across every stage of the investment cycle, aligning perfectly with client objectives. Whether focusing on income, growth, or risk management, our expert advisory team works closely with you to craft an ideal portfolio. Our diverse product portfolio includes distinctive options:

Growth Strategies



Preservation Strategies



Income Strategies

