Lowell Blake

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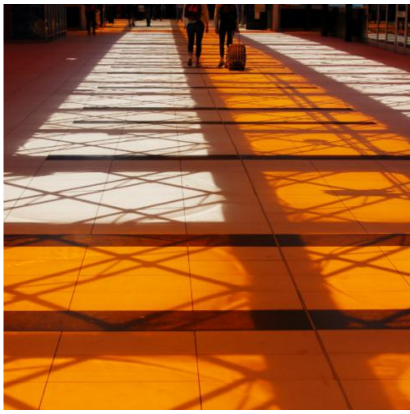

# Investment Management

## Team

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## Clients

Individuals & Families
Foundations, Endowments & Charities
Law Firms

## Overview

We take a decidedly personal approach to investing at LBA. Instead of trying to steer clients into a fixed set of least-common-denominator model portfolios, our team builds a distinct custom portfolio for each client, based solely on what they want and need.

Our investment philosophy is built on a bottom-up equity analysis approach. We handpick individual stocks and bonds to build client portfolios; we do not utilize mutual funds or ETFs. We feel it's crucial for investors to know what they own and why, and this is only possible when each security is individually researched and selected with purpose.

Of course, choosing individual stocks has the added benefits of eliminating a wasteful layer of management fees and allowing greater control over capital gains and income streams, but our ultimate aim is to ensure that clients only hold investments that fully reflect their goals and preferences.

In choosing securities, we don't rely on Wall Street insiders, but conduct our own independent, rigorous research of markets, trends, and companies. Our detailed analysis identifies companies that have positioned themselves for long-term growth by using financial resources wisely, making sound management decisions and innovating to improve products and services.

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