



Promotion

## Sloy, Dahl & Holst, Inc.

Integrity – Independence – Communication

Sloy, Dahl & Holst, Inc. is an independent Registered Investment Advisory firm located along the Willamette River in scenic downtown Portland, Oregon. The company was founded in 1986 by Certified Financial Planners Ron Sloy, Tony Dahl (deceased) and Jim Holst, three enterprising young men who dreamed of offering their clients truly unbiased and conflict-free investment advice. They turned their dreams into reality with one of Portland's first fee-only money management firms specializing in retirement planning and wealth management.

*"True investment advice is focused solely on what benefits the client. It must be free from bias, artificial limitations, proprietary products and any incentive that detracts from the client's best interest."*  
– Ron Sloy, CFP®

Within today's vast investment universe of worldwide markets, ever changing investment vehicles and an overwhelming variety of equities, ETF's, bonds and mutual funds, it is the job of the advisors at Sloy, Dahl & Holst, Inc. to lead their clients through this maze of choices, implementing finely tuned investment criteria to develop custom risk-assessed portfolios for each client. Careful re-allocation, done as required by ongoing portfolio review, should not be confused with market timing.

*"Market timing does not work. There has never been an investment advisor who has proven an ability to buy at the bottom and sell at the top."* – Ron Sloy, CFP®

In the beginning, the firm's success was driven by individual clients who came in droves to the open-architecture of the fee-based firm, eager for objective advice. Additional success has come from the application of the same system to a corporate clientele. Applying this broad base of knowledge to their newest niche, focusing on the 401(k) industry, has again given them the edge over their more restricted, bundled competitors.

*"A definable process to review and monitor your plan options is necessary in these times."* – Jim Holst, CFP®



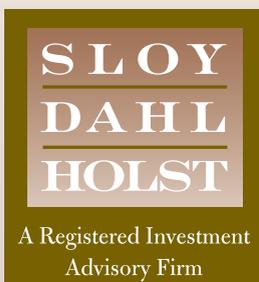
Michael Tudor, VP Marketing; Ron Sloy, CFP and Jim Holst, CFP

*"Owners need to understand that a well diversified plan, based on an established investment policy statement, is necessary to safeguard their employees and honor their fiduciary responsibilities."* – Michael Tudor, VP Marketing

Ron Sloy and Jim Holst strive to set the industry standard in communication, service and performance for their 401(k), retirement planning and wealth management clients alike. With over 50 years of combined experience, they have seen almost every kind of market imaginable, gaining perspective of great value particularly in fear-driven markets like the current one.

*"The current market conditions mandate careful review for all investors. This is the time to assess your goals, craft a portfolio to meet those goals with the lowest amount of risk and then implement the plan. Performance is vital, but it is communication which builds understanding and trust. Communication combined with consistent performance is what ensures our clients' success."* – Jim Holst, CFP®

Sloy, Dahl & Holst, Inc. was built on the premise that listening to a client's needs and translating them into an investment allocation is what creates the foundation of a successful relationship.



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