

SLOY DAHL HOLST

A Registered Investment
Advisory Firm

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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.

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.

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.

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.

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.

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

A definable process to review and monitor your plan options is necessary in these times.

Jim Holst, CFP

Market timing does not work. There has never been an investment advisor who has proven an ability to buy at bottom and sell at the top.

Ron Sloy, CFP



Michael Tudor, QPFC; Ron Sloy, CFP and Jim Holst, CFP

Introducing

GROUP IRA

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We realize rolling over your retirement account can be challenging. You receive little advice and brokers try selling you high cost investments. GROUPIRA is designed to help.

GROUPIRA leverages the collective buying power of many investors to access high quality, low cost mutual fund investments, which are generally unavailable to retail investors.

Before GROUPIRA, only large institutional investors could access the best priced investments. Individual investors never stood a chance, but GROUPIRA changes that. Collective buying power drives down investment costs, so more of your money works for you.

Additionally, with GROUPIRA, you can select professionally managed risk-based model portfolio investments, removing guesswork from investing.

Call us for a complimentary consultation at 503-248-9800

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