

TRANSITIONS

MY INVESTMENT IN YOU

As I celebrate another birthday, I reassure you that I will continue working at my same vigorous pace for some years to come. Age 65 for many is a milestone to retire, but I am not one of them. Although I have lifelong hobbies of woodworking and sailing that could divert my full-time attention, the truth is that I am truly enjoying my work as your Investment Advisor.

Being a great portfolio manager did not happen overnight. Having been through several major complete market cycles, I have the advantage of having observed how investing works over the long term, and that is why I feel so energized coming to work. Five decades of continual focus on the analysis of stock ideas and the subsequent construction of individual portfolios has created a knowledge on the science and art of investing that only a few have. Using this acquired instinct about the market conditions is at times very exhilarating, much like swimming in heavy surf.

Yet this alone is not why I continue my career for the foreseeable future.

I have been blessed with having great clients, whom I treat as my close friends. Placing these close friends first has always been my priority. Friends often provide sage advice. In describing their life experiences and perspectives, they really are passing wisdom on to me about using their wealth to live a good life. Our whole focus on a conservative investing strategy came from such conversations. With my extensive work on individual portfolios, observing family dynamics tuned my thinking to look at building generational wealth. Generating a steady return is far more important than chasing the latest investment fad. We are often working with our second and third-generation clients, some of whose families have been with us since the 1960s. When you have been providing counsel and guidance to families for this long, I am very intrigued to see just how well the plans we make turn out for the next generation.



Herb Diamant

PRESIDENT & SENIOR
PORTFOLIO MANAGER

DIAMANT
ASSET MANAGEMENT

440 Main Street
Ridgefield, CT 06877
(203) 661-6410

As many of you already know, I really love what I do. Every day I go to work with a passion for investing. Knowing which current events correlate to the stock market, I get to uncover new investment ideas of companies to add to portfolios. When engaged in the art of stock picking, it always is a thrill to identify fundamental factors that make certain stocks stand out from the market clamor. This is especially so when institutions mistakenly place their trust in computer algorithms to make decisions. As important, I do enjoy discussions on creating an investment strategy, as it is personally rewarding to reflect on a client conversation and then be able to solve their investment and planning issues in a straightforward manner.

I measure my happiness by seeing how my collected wisdom has benefited my clients. This is why I remain content in continuing my career. I wish everyone another Happy Birthday this year. Can't wait to see what the future will bring all of us!

Here's to many more years,

Herb



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Written by: **Herb Diamant**, President and Senior Portfolio Manager. Please feel free to contact us with any questions or comments at **(203) 661-6410** or email Herb directly at **herb@portfolioadvisor.com**

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Diamant Asset Management was built on a foundation of family and friendships with ethics and integrity as our guiding principles. As an independent Registered Investment Advisor, we take our fiduciary responsibility seriously and act as a guardian of your wealth.

Managing wealth through the transitions of life. It's what inspires us to do what we do every day.