

Providing Peace of Mind to Those Depending on Their Capital

The Proper Analysis is an independent, fee-only financial advisor located in Cleveland, OH. We were created to bring sophisticated and prudent investment strategies to clients seeking confidential, comprehensive, and cost-effective investment management. Clients choose one of several discretionary models that emphasize risk control and long-term returns.

Our investment philosophy is conservative. The preservation of capital and its future purchasing power is our primary concern. We strive to reduce portfolio volatility and enhance total return through broad diversification.

Every month, clients receive reports of all transactions from an independent custodian. Clients are encouraged to meet with us quarterly or semiannually to discuss changes in their financial situation, changes in the financial markets, and the structure and performance of their portfolio.

We help clients to think strategically about their finances and identify their financial goals. Clients are provided with a personalized investment policy statement outlining their investment goals. After a written policy is approved by the client, it is implemented in a disciplined way where objectivity is maintained. This tends to eliminate the often expensive tendency to react emotionally to changes in market conditions. Flexibility is designed into the plans, so modifications can readily be made due to changes in a client's situation. The focus is on the long-term overall financial picture.