

# FINANCIAL SERVICES REVIEW

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**FINANCIAL ASSET  
MANAGEMENT**

**EDITION**



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**FINANCIAL SERVICES REVIEW**





# Risk-Adjusted, Tax Efficient Returns



**T**he dual uncertainty of a global pandemic and inflation has increased the need to protect clients' investment portfolios, but there is a catch.

Investors find it challenging to complete comprehensive analyses of the global economy, stock and bond markets, assess stock valuations, and select individual securities. Investment options for clients, such as mutual funds and ETFs, are not helpful for high net worth individuals and families in down markets.



We specialize in providing Customized Balanced portfolios for clients

Separately Managed Accounts (SMAs) provide an attractive solution. Abner, Herrman & Brock Asset Management's (AHB) focus on SMAs is a clear differentiator that "offers superior benefits over mutual funds and ETFs. SMAs allow for customization and a greater level of tax efficiency," says Caryn Zweig, CEO at AHB.

Abner, Herrman & Brock Asset Management, founded in 1981, is a Jersey City, NJ-based, independently owned investment advisory firm with more than \$1.6 billion

in assets under management. AHB's customized, tax-efficient, actively managed accounts (SMAs) offer unique personalized client engagement for individuals and their families, corporations, trusts, endowments, and foundations. "We specialize in providing Customized Balanced portfolios for clients," says Zweig.

"AHB has a deep investment process across global macroeconomics, stock selection, investable themes, and fixed-income. AHB's investment team collaborates to make investment decisions that are implemented across client portfolios," adds Zweig.

AHB clients' Balanced portfolios focus on risk-adjusted investment returns. Based on each client's unique situation, an appropriate balance of stocks and bonds is created to meet their investment objectives.

David Linsen, Sr. Vice President of AHB, emphasizes, "AHB offers clients the opportunity to customize the asset allocation of stocks and bonds in their portfolio. AHB portfolio managers work with each client to manage capital gains for tax efficiency. This level of customization is key to delivering a superior outcome for each client."

"Working with clients and providing high-touch investment management from a client's inception is at AHB's core. AHB provides clients, and their Financial Consultants, with access to AHB's portfolio managers. This customized (Carriage Trade) service differentiates AHB from its competitors." Zweig adds. [fs](#)



*The annual listing of 10 companies that are at the forefront of providing Financial Asset Management services and impacting the marketplace*