

May 18, 2025

An Evidence Based Process that Uses Current and Objective Data to Produce Better Client Outcomes

As I'm watching the number one ranked golfer in the world, Scottie Scheffler, win this year's second major, I reminded myself that all four teams—Duke Blue Devils, Florida Gators, Auburn Tigers, and Houston Cougars—entered the NCAA Men's Basketball Tournament as No. 1 seeds. Their journey to the semifinals underscored a fundamental principle: success is often rooted in solid fundamentals and consistent performance.

While people's brackets were full of bold predictions and underdog hopes, in the end, the cold, hard data prevailed. The teams that advanced were those with the best stats, the most consistent performance, and the strongest resumes throughout the season.

It's a timely metaphor for investing. In a world full of headlines, hot tips, and speculation, it's tempting to chase the next Cinderella story; however, history has shown us that a disciplined approach rooted in current and objective data produces the most reliable outcomes over time.

I apply this philosophy to managing portfolios. My decisions are based on comprehensive research and a commitment to strategies that have consistently proven effective. While this approach may not always capture headlines, it is designed to help navigate market complexities and work toward achieving your financial objectives.

I hope you enjoyed the excitement of the NCAA Tournament, and as always, feel free to reach out if you have any questions or would like to discuss your financial strategy further.

My Very Best,

A handwritten signature in blue ink, appearing to be 'JG' or 'Jack Green', written in a cursive style.

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