



Special Advertising Section

MOODY, LYNN & COMPANY OFFERS FLEXIBLE STRATEGIES FOR HIGH-NET-WORTH AND INSTITUTIONAL CLIENTS

Investors have more choices than ever before when it comes to deciding where to put their money. That means more reasons to be careful about whom they trust to make those decisions. Experience, integrity and a proven track record are equally important factors to consider. So is the advisor's willingness to provide bend-over-backwards, personal attention to every client, not just the super-rich. No wonder so many individuals and families of substantial wealth turn to the Boston-based firm of Moody, Lynn & Company.

With three senior portfolio managers at the helm, Moody, Lynn oversees both equity-oriented and balanced accounts, based on a flexible core strategy that combines a bottom-up stock selection process with a top-down economic and sector analysis process. By analyzing economic, industry, demographic and other factors, the firm seeks to identify important secular trends, constructing portfolios that have the potential to generate positive returns, even in difficult market environments. It is a proactive approach that has produced impressive results through the years.

"We're talking about opportunistic, prospective growth—forward-looking as opposed to in the rearview mirror," explains partner Martin Lynn. "Most five-to-10-year periods have one or two central ideas that are key to the investment results for that period, whether it's inflation in the '70s, disinflation in the '80s, the Internet in the '90s or natural resources and emerging economies in the current period. We want our clients' portfolios to be on the right side of major investable trends."

As wealth management firms go, Moody, Lynn is a rarity. It is one of the few independently owned firms of appreciable size that has not been swallowed up by a national bank or a larger investment conglomerate. Moody, Lynn also boasts an unusual continuity of leadership, with the firm's named principals having worked together practically from the beginning. Since 1989, under their leadership, Moody, Lynn has grown from \$20 million under management to over \$1 billion today, primarily as a result of personal referrals by satisfied clients. Clearly, the firm is doing something right.

"All investment firms have their share of old-line money, and we are no exception, but I think we particularly appeal to some of the newer entrepreneurial wealth," Bob Lieberson says. "Having direct access to the principal investment manager and decision-maker is a comfort. People who have put years of sweat-equity into



Like the Old State House amid Boston's modern skyscrapers, Moody, Lynn & Company manages both old and new wealth. Pictured are partners Bob Lieberson, Michael Moody and Martin Lynn.

creating a nest egg don't want to turn it over to a client relationship manager who might be several bureaucratic layers removed from the professional who does the actual investing."

Indeed, from chief executive officers of large publicly traded corporations to independent entrepreneurs, a growing number of New England investors appreciate the fact that at Moody, Lynn, they are dealing directly with a principal who is responsible for their account.

"The fact that our names are on the door gives us a special feeling of responsibility and accountability," says Partner Michael Moody. "Through bear markets, bull markets, growth markets and value markets, we've been able to position client portfolios to make money or preserve capital, depending on the environment."

For more information, call Bob Lieberson at 617.973.0590 or visit www.moodylynn.com

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