



Left: Skip Motsenbocker, managing director/chief marketing officer & Mike Orzel, managing director/chief compliance officer

Smart investments—without a crystal ball

Many investors were shell-shocked after opening their 2008 year-end performance reviews and they are worried about their financial futures. SignalPoint Asset Management developed a proprietary investment strategy to help its clients regain their wealth, long-term financial stability and provide insulation from stock market volatility.

“2008 was a devastating year for people invested—whether in land, stocks or bonds,” says Skip Motsenbocker, managing director. “Virtually every asset class has taken a hit and we have come up with a way to help people reduce their risk as they rebuild their nest eggs.”

Located on the corner of Walnut and National, the money management firm of SignalPoint Asset Management, LLC is garnering national and global attention for its proprietary financial products. The eight-member company manages its clients’ assets through investments in several portfolios that use a proprietary investment tool called SignalPoint™. This mathematical process, developed by Chief Investment Officer Tom Veale, has outperformed the stock market for the last eight years with significantly less risk.

“Our firm’s algorithmic strategy seeks to accomplish three major goals: preserve capital, improve returns and reduce financial stress,” Veale said.

After managing the portfolios for many years

under various platforms, SignalPoint Asset Management opened in 2008 as a Registered Investment Advisory firm (RIA) with Schwab Institutional to work with private investors and financial institutions, such as pension funds, endowments, 401Ks, banks and other wealth advisors.

Although the firm is new, the portfolios have significant history and the three managing directors have more than 40 years of combined experience in financial services and investment management. The firm specializes in the core needs of high net worth and institutional investors with portfolios that average more than \$500,000.

To put it simply, when your money is invested in a SignalPoint™ Portfolio, whenever the market moves, your money moves. The mathematical strategy calls the shots — incrementally and carefully capitalizing on both ups and downs in the market. It’s not influenced by anyone’s “gut feeling,” mass hysteria or the intuition of a portfolio manager. That’s why we can call SignalPoint a “nearly emotion-free investment model.”

“This process has been very well received by both investors and industry professionals,” says Mike Orzel, Chief Compliance Officer. “It’s a great story that everyone should know especially in light of the current economic environment.”

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Top Executives:

Skip Motsenbocker, managing director/chief marketing officer
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 Tom Veale, chief investment officer

Year Founded: 2008

Number of employees: 8

Product or service:

Institutional and private wealth money management

