

M!OHRASSET

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(Investment Mix) 가

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4
(Modern Portfolio Theory)

(Investment Policy Statement)가

Mohrasset

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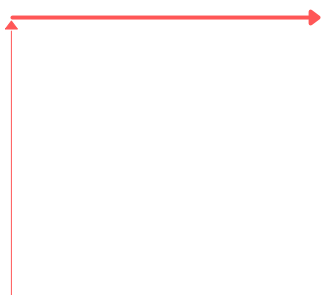
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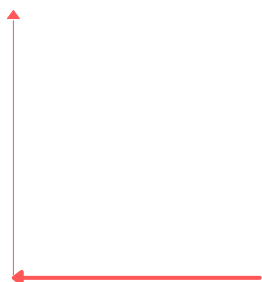


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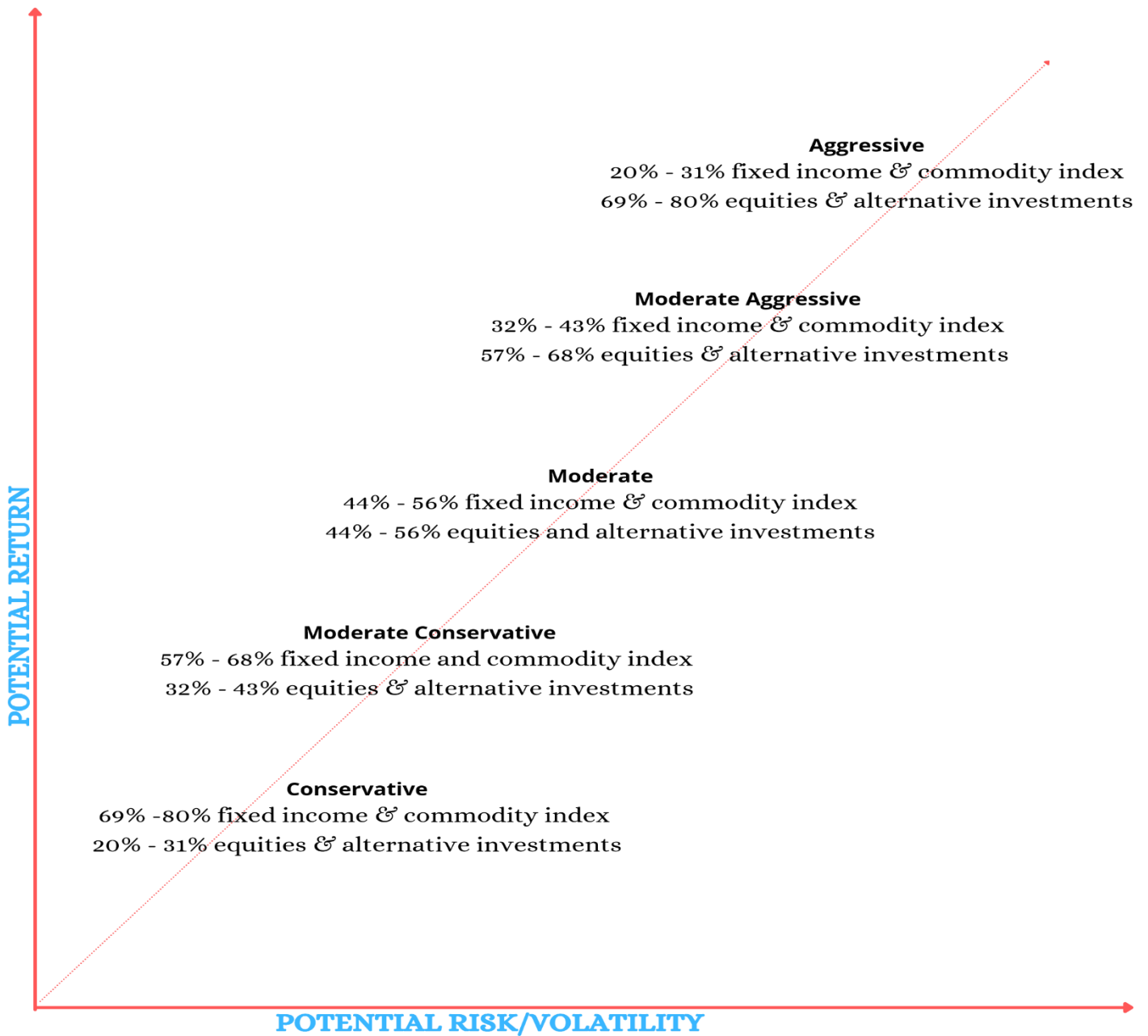
2 :



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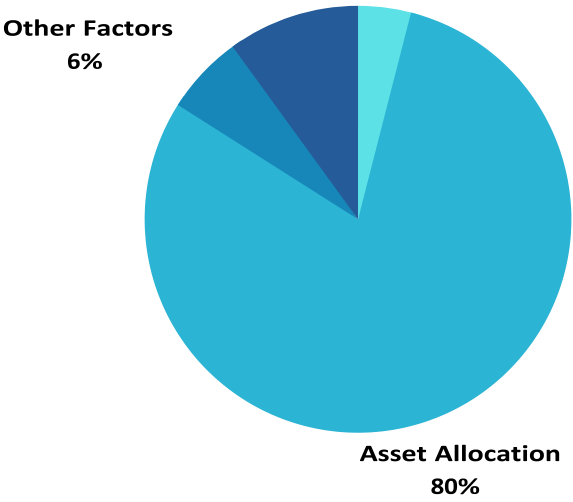
ESTABLISHING YOUR RISK/RETURN PROFILE



2 :

(Asset Allocation)

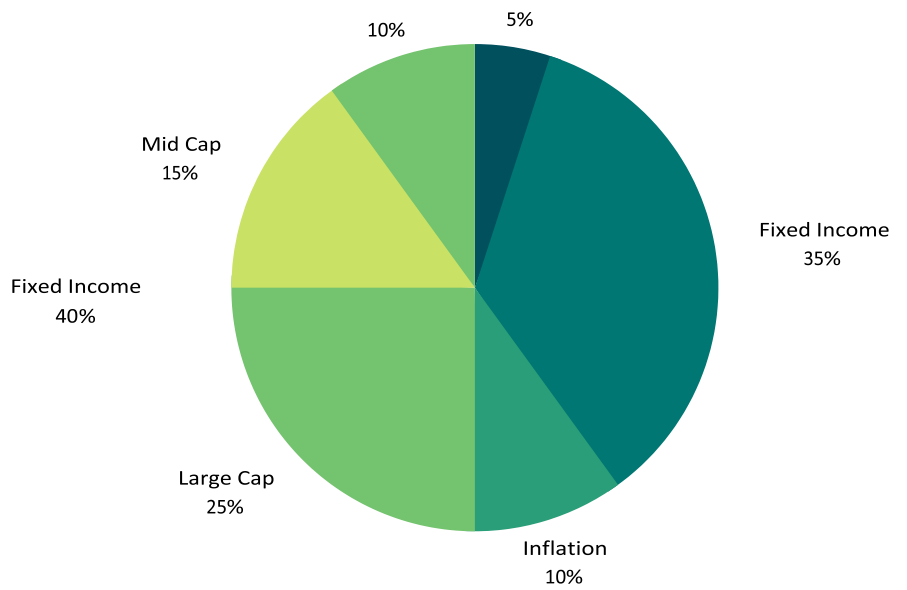
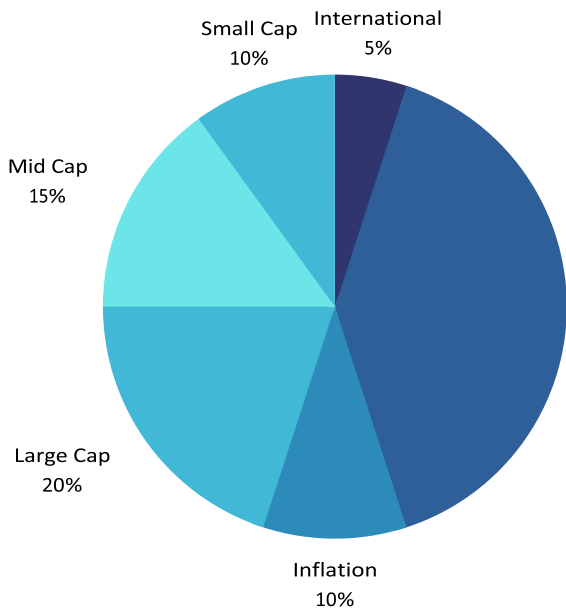
Beebower(1991) , Brinson, Hood, Beebower(1986) 90% Brinson, Singer,



1990 , (Harry Markowitz) (Modern Portfolio Theory)' ,

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CRYPTO CURRENCY

(Tax-loss

harvesting)

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(tax-loss

harvesting)

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가 (Indices)

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(Cold-storage)

4 :

/ (Broker/Dealer) FINRA() SIPC()
가 (Custodian) /



David Berrado Lopez

FMRRRC



Olivier J. Francois

FCA



C. Ah-Hen

IFMRRC



BOB COLBY

FINRA

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(asset classes)

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- (Moderate)
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- (Large-Cap) ,
(Growth style) 가 (Value style)
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(Testimonials)

" Mohrasset Investment Services

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VIP
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(OLEG BRUSOV) /

" Mohrasset Investment Services

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Vanguard 401(k)
IRA (Rollover)
가 (dead stocks) Moh
Investment Services
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(SEAMUS WALSH) /

" 2018 11
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(LANCY BENCH) /

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Adam
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(SANDRA BARON) /



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Mohrasset Investment Services

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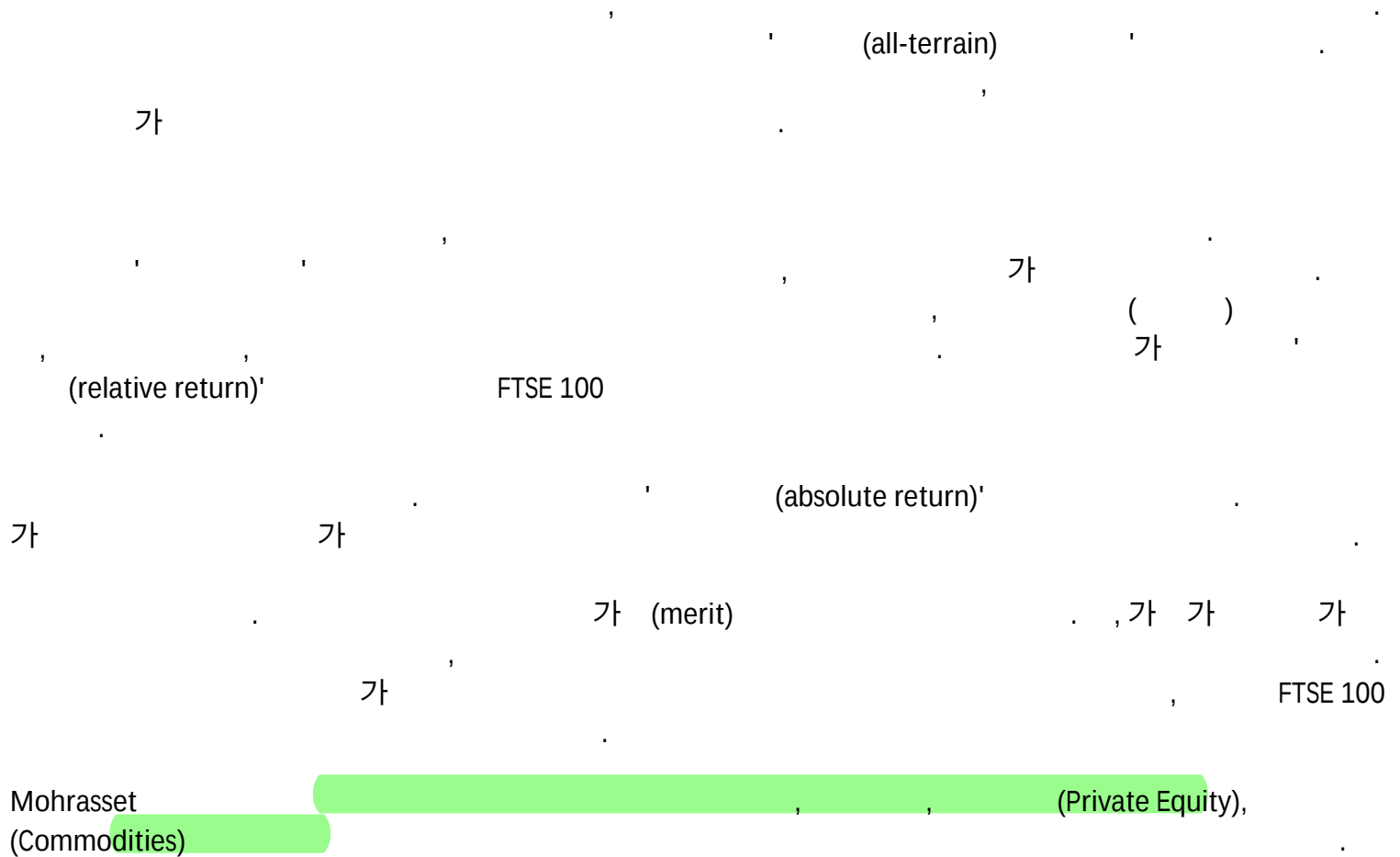
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Mohrasset



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(Financial Services Authority)
FINRA

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(MDD)

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2002 Act 37 of 2002) 37 (Financial Advisory and Intermediary Services

(replacement)

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