Researching and Building the All-Weather Portfolio

Gentry Wealth Management

Talk about a success story.

Fueled with the vision of a client-centric service model and leveraging an effective, decade-long working partnership, Gentry Wealth Management opened for business in 2005, just over a year before the great financial recession began. The firm’s founders – William Mentis and veteran financial advisors Aaron P. Brodt and Christopher J. Bowman – had a strong belief in their firm’s unique value proposition and considered the turmoil in the marketplace fertile ground to showcase their platform.

Not only did the firm endure, it flourished. Less than a decade later, Gentry has offices in Scottsdale, Las Vegas and Salt Lake City – with a California office due to open in 2012 – not to mention a growing client base spanning six Southwestern states and beyond.

“Despite several years of economic turbulence, we’ve continued to grow,” Brodt says. “I think our success speaks to our ability to guide high-net-worth individuals through periods of uncertainty by staying comfortably ahead of global market trends.”

Security, Success Require A Solid Foundation

Weathering powerful market forces requires customized, holistic financial planning. In Brodt’s view, an advisor must have a detailed understanding of a client’s entire financial picture – all of its facets and the dynamic relationships between them – to preserve wealth and pave the way for long-term growth.

“There is nothing off-the-shelf about our approach,” Brodt explains. “We take a very deep dive into every aspect of our clients’ financial lives. We look at everything – financial planning, tax planning and estate planning – to develop solutions that precisely fit each client’s unique circumstances, making sure all parts of the plan are working in concert.”

Pinpointing Opportunities, Bracing for Change

According to Brodt, Gentry’s intensive, ongoing research and proactive portfolio management have served its clients well, particularly in the rough market conditions of recent years. “We’re a tactical firm, continually forecasting on a global front and positioning clients’ portfolios to mitigate as much of the risk as possible while maximizing the rate of return.”

To that end, Gentry’s advisors rely on a full spectrum of traditional, nontraditional and highly selective investment vehicles, weighting portfolios in accordance with economic cycles and emerging growth opportunities. The firm also maintains close relationships with some of the world’s top financial institutions, further enhancing its research and investment capabilities.

Most important, says Bowman, are the firm’s efforts to ensure clients are fully on board and up-to-date. “Communicating frequently, being completely accessible and making sure we’re all on the same page – this is fundamental to success.”