



ECON WEALTH
MANAGEMENT

ACTIVE MANAGEMENT

ADVANCED STRATEGIES

Econ Wealth integrates advanced portfolio management techniques and data-driven insights to deliver tailored investment solutions.

Advanced Strategies



Private Investments

Objective: Enhance portfolio diversification and capture opportunities not typically available in public markets.

Appropriate For: Qualified Purchasers or Accredited Investors

Investment Risk: Above Average



Options Contracts

Objective: Utilized to protect positions, provide income or manage portfolio risk.

Appropriate For: Concentrated stock holders & investors seeking additional income generation.

Investment Risk: Moderate



Custom Bond Laddering

Objective: Generate recurring cashflow streams based on specific income needs.

Appropriate For: High income earners & investors seeking scheduled income distributions.

Investment Risk: Low

For more information about each advanced strategy, click the names below:



Private Investments

[Private Placements](#)

[Private Credit](#)

[Private Equity](#)



Options Contracts

[Protective Puts](#)

[Covered Calls](#)

[Put/Call Collars](#)



Custom Bond Laddering

[Municipal Bonds](#)

[U.S. Treasury Bonds](#)

[Corporate Bonds](#)

Important Disclosures: The information contained herein is for educational and informational purposes only and should not be construed as personalized investment advice. All investments involve risk, including the potential loss of principal. Not all investment strategies are suitable for all investors. Each client's portfolio is designed to align with their unique financial situation, objectives, liquidity needs, and risk tolerance. Strategies discussed, including options contracts, private investments, and bond laddering, may be available only to investors who meet certain financial and regulatory qualifications. EWM evaluates each client's circumstances to determine the appropriateness of any particular investment or strategy. The inclusion of external links is provided for informational and educational purposes only and does not constitute an endorsement or recommendation of the third party or its products and services.