

# Fey Asset Management LTD.

## ***Company Profile***

We are Fee-Only Financial Advisors specializing in Retirement Income growth. We are unique in providing individuals and small businesses investments typically available only to large institutions. This unique approach precisely targets the world's most attractive markets at the lowest possible costs. We specialize in index and passive investment management because this type of investment has been demonstrated to offer the best returns. Our investment strategy is based on academic research, and uses diversified portfolios of ETFs, ETNs, Mutual Funds, stocks and bonds.

We are registered investment advisors. Typical fees range from about 0.6% to 1% of assets under management. Our recommended account minimum is \$500,000, although exceptions may be made. Our primary custodian is Pershing.

We are headquartered in Pittsford, NY. However we have clients across the United States and Europe.

We offer a free initial consultation.

To schedule your free initial consultation with Curt F. Fey, PhD, CFA, CFP and President of Fey Asset Management, contact us by phone or fax at (585) 244-0152 or by Email at [CurtFey@CurtFey.com](mailto:CurtFey@CurtFey.com).

## **Who is Curt Fey? (Bio)**

Curt grew up in Switzerland, earned a BS with honors from Haverford College, an MBA (Beta Gamma Sigma Honorary Society) from the University of Rochester, and a PhD from the University of Pennsylvania. He received a CFA (Chartered Financial Analyst) designation in 1984. CFA's are typically security analysts who work for institutions rather than for individuals. He is a Certified Financial Planner (CFP), a member of the National Association of Personal Financial Advisors (NAPFA), and a Registered Investment Advisor (RIA). He was a member of the Rochester Council of the Financial Planning Association in charge of education, and is a member of the Rotary Club and the Oak Hill Country Club. He has been married for over 40 years to Marion, a former professor from SUNY Geneseo. They have one son, Carl, a professor at the Stockholm School of Economics in Stockholm, Sweden, who is a director of the firm.