



**Lisa Fitzgerald Lewis**  
Senior Vice President – Wealth Management  
**Morgan Stanley Smith Barney LLC**  
53 State Street, 39<sup>th</sup> Floor  
Boston, MA 02109-2804  
Tel 617 589 3369 / 800 752 2678  
Fax 617 227 9070  
lisa.fitzgerald.lewis@smithbarney.com

## Investment Philosophy

My investment philosophy is based on the following principles:

- ✂ Start by identifying your goals.
- ✂ Determine your tolerance for risk and expectation of return.
- ✂ Formulate strategies based on your goals and objectives.
- ✂ Reduce risk and enhance potential returns through asset allocation.\*
- ✂ Develop investment strategies based on your time horizons.
- ✂ Diversify investments among asset classes of stocks, bonds and cash.\*
- ✂ Preserve purchasing power.
- ✂ Seek total return from investments through income as well as capital appreciation.
- ✂ Derive a long-term approach to investing.
- ✂ Monitor investments and make timely adjustments.

*In summary, I will help you establish a focus based on your goals, develop a system to help you achieve those goals, and maintain a discipline that is necessary to help you navigate the complexities of today's financial markets.*

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**Morgan Stanley Smith Barney LLC.** 53 State Street 39<sup>th</sup> Floor Exchange Place Boston, MA 02109-2804 Tel 617-589-3500 Toll Free 800-752-2678

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\*Diversification does not ensure against loss

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