



ABOUT US

Portfolio Monitoring LLC works with Native American Tribes, institutions, trusts and families to monitor their investment portfolios. Professor Hugh Cohen and his team break down the complexities of financial investments and help clients understand the risks and potential performance of their portfolios on an ongoing basis.

Professor Hugh Cohen, Founder

For more than 2 decades, Prof. Cohen has lectured at the Goizueta Business School at Emory University and analyzed investments as a testifying expert witness/consultant multiple times for each of the following regulatory agencies:

- Delaware Insurance Commissioner
- Federal Bureau of Investigation (FBI)
- Internal Revenue Service (IRS)
- Securities and Exchange Commission (SEC)
- United States Attorney's Office

Prof. Cohen's previous regulatory retentions were typically after significant investor losses. His motivation in founding Portfolio Monitoring LLC resulted from a desire to help investors avoid losses from unknown fees or risks. **We bring comprehensive portfolio oversight to investors to help them understand their securities and make informed investment decisions.**



Portfolio Monitoring LLC
(770) 971-0507
portfoliomonitoringllc.com

OUR FIRM WORKS CLOSELY WITH CLIENTS TO HELP THEM UNDERSTAND:



FINANCIAL ADVISOR DISCLOSURES

How much do you know about your financial advisor?

How much do you know about the firm managing your investments?

INVESTMENT GUIDELINES

Do you have investment guidelines?

If so, do you understand the risks associated with your current investment guidelines?

How are Investment Guidelines used?

- Understanding your Investment Guidelines
- Taking Control of your Investment Guidelines

MONITORING CASH FLOW

Monitoring Withdrawals

Monitoring Inflows

Monthly Schedule of Cash Flows

COMMISSIONS AND FEES

Markups and Markdowns

Miscellaneous Fees

TRADING

How good are the trades allocated to your account?

Frequency and Cost of Trading vs Potential Benefit of Trading

RISK

What is risk?

If I had a "bad year" how much could I reasonably expect to lose?

Diversification—How do individual investments contribute to overall portfolio risk?

PERFORMANCE

Why should I be concerned about my performance metrics?

Performance is a function of the prices used to value the portfolio. Where do the prices come from?

Are your portfolio returns accurate?

Is the benchmark reasonable?



THE OVERALL RESULT

Having an outside firm monitor your performance on a monthly basis significantly reduces the likelihood that a scheme to defraud your account could go undetected for very long, giving you both added protection and peace of mind.