Hapanowicz & Associates

One Oxford Centre,
301 Grant Street, Suite 2550
Pittsburgh, PA 15219

P: (412) 261-5966
F: (412) 261-3353

H&A Investment Strategies: Balanced Portfolio

The H&A Balanced Investment Strategy seeks capital appreciation, as well as, a measurable amount of current income and stability via investing in a portfolio that is divided roughly equally between stocks and bonds. The Balanced Investment Strategy has a total return objective.

- This strategy takes a measured approach to both risk and return.
- Target allocation is 50% stocks/50% bonds + cash. The targeted stock allocation range is 35% - 55%.
- The stock component delivers capital appreciation and keeps a measurable amount of current income via dividends. Stocks are diversified across U.S. large, mid and small cap securities, as well as internationally across both developed and developing regions.
- The bonds component is intended to deliver current income via regular interest payments from underlying bonds, as well as to provide stability and equity diversification. Bonds are typically diversified across sector, maturity, credit quality and geography. Bonds allocation may include a strategic component designed to reduce portfolio duration in a rising interest rate environment.
- Both the stock and bond components may be managed with a total return objective.
- This strategy is designed for the conservative investor with an average risk tolerance and long-term investment (greater than five years) horizon.
- This strategy may be suitable for the conservative investor seeking a total return long term income stream.