



## PRESS RELEASE

### **For immediate release**

For additional information contact:  
Isaac Braley, BTS Asset Management  
(800) 343-3040 ext. 343  
[ibraley@btsmanagement.com](mailto:ibraley@btsmanagement.com)

Clare Bergquist, The Lowe Group  
(414) 614-1583  
[clare@lowecom.com](mailto:clare@lowecom.com)

### **Advisors Say Their Clients Seek Conservative Strategies** BTS Asset Management Webcast Survey

**LEXINGTON, MA – November 21, 2014** – BTS Asset Management, a tactical fixed income investment firm, recently surveyed advisors about their clients’ top concerns.

When asked on a scale of one to five with five being the highest, “How important is capital preservation for your clients?,” 75% of the advisors that opted to vote on this question selected four or five, 20% rated it three, 6% rated it two and 0% rated it one.

Said Isaac Braley, President of BTS Asset Management, “Advisors are tuned in to the fact that clients [may] want to hear more about conservative investment strategies and preservation of capital.”

When asked about which concern their clients were most worried about, advisors that opted to vote answered as follows:

Losing money on equity investments	45%
Losing money on fixed income investments	19%
Not having enough income	30%
Not keeping up with the market	6%

This result may confirm the importance of conservative investment approaches.

As advisors consider investment products for their clients, they can feel confident that vetting a track record is more important than the brand of an investment firm. When advisors were also

asked “Which is more important, brand or track record?” 99% of those that voted answered “track record.”

Said Braley, “Many advisors are quick to mention track record as the key determinant in choosing managers. However, often times we see the allocations going to brand. Now there is a misconception regarding track record with those brands. Brand usually gets the money first, especially new products in an established brand. That’s not track record.”

BTS surveyed advisors during a November 13 webcast called Find Opportunity – Managing Traditional Fixed Income & Equity Assets with a Non-traditional Approach. Please [CLICK HERE](#) to view the presentation.

### **About BTS Asset Management**

Founded by [Vilis Pasts](#) in 1979, [BTS Asset Management](#) is one of the nation’s oldest third party money managers, providing quantitative risk management and potential portfolio solutions for mutual fund and variable annuity clients looking for income and/or total returns. BTS has multi-year track records in tactical fixed income and equity management dating as far back as 34 years, seeking to provide advisors and clients alike with the experience and service of an established money manager.

###

*Investments are subject to risk, including loss of principal. There is no guarantee that any investment strategy will achieve its objectives, generate profits or avoid losses. Investors should carefully consider the investment objectives, risks, charges and expenses of any portfolio before choosing to invest.*

**BTS Asset Management is affiliated with BTS Securities Corporation, member FINRA/SIPC. Securities are offered through BTS Securities Corporation and other FINRA member firms. Advisory services are offered through BTS Asset Management, Inc.**

PAST PERFORMANCE IS NO GUARANTEE OF FUTURE RESULTS.