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Independent Thinking and Solid Research Help Protect Investors' Bottom Line

By the time the impact of the 2008 financial turmoil was being fully realized by the investing public, Peter Sargent, Executive Vice President/Wealth Management, was feeling more confident than ever in his ability to position his portfolios in a way that would traverse the seemingly never-ending crisis. As the recovery began in earnest in 2009, most of his clients were still well on their way towards their financial goals. And it wasn't the first time Sargent was able to navigate through uncertain market conditions; he also steered his clients through the unforgettable downturn of 2000-02.

Sargent, who formed Sargent Wealth Management at Janney Montgomery Scott LLC when he joined the Newtown/Yardley branch office of the Philadelphia-based regional firm in early 2012, explains that the tell-tale signs of market instability and valuation were evident before both events. But even a knowledgeable and sophisticated investor, much like those that make up the exclusive group of Fortune 500 C-level executives, entrepreneurs, and small- to medium-sized foundations and institutions that represent a large portion of Sargent's client base, were likely to miss the signs.

"Nothing takes the place of in-depth research, by someone with a thorough understanding of business valuation, that I'm able to conduct on behalf of my clients," explains Sargent, who holds both the CFA designation and CFP® certificate and relies on his own independent analysis of the equity markets as a guide for his overall investment strategy. "I can't recommend putting an asset into a portfolio until I'm satisfied the price makes sense."

This approach, along with the wherewithal to make bold decisions based on experience and expertise, as well as a willingness to take a contrarian's view, has enabled Sargent to help his clients weather even the most turbulent market conditions over the last few decades.

"Sometimes intelligent investing is not what you do, it is what you don't do," he explains. "Over the years, I often have stuck my neck out by refusing to follow the crowd."

Though Sargent may not be one for following the crowd; he's certainly no stranger to standing out among one. Featured as one of *On Wall Street* magazine's "Top 40 Advisors Under 40," he also was selected to the prestigious *Barron's* "Top 1,000 Advisors" list, named a 2011 *Premier Advisor* by the National Association of Board Certified Advisory Practices, and featured in the *Philadelphia Business Journal*.

While these national and local rankings are welcome acknowledgements by the industry, Sargent and his staff most value the loyalty of their clients, with the group boasting an impressive client retention rate.

So what's next on the economic horizon? Having seen fairly calm markets for the past three years, Sargent is aware of the rising risks as investor complacency sets in. He recently remarked, "As the old saying goes, be greedy when others are fearful and be fearful when others are greedy."

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