



## Schorpp Capital Management, P.C.

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#### 1st Quarter Market Results

- > S & P Energy +19.54%
- > 10Yr Treasury +4.35%
- > Gold Futures -2.99%
- > S & P 500 -3.34%
- > DJIA -3.92%
- > Hang Sang -4.04%
- > Russell 2000 -6.4%
- > Nasdaq Comp. -8.83%

### A Heartfelt Thank You

We here at Schorpp Capital Management want to thank you for your business and the confidence you have shown in us. As all of you know this was a big transition year for the firm. Moving all of our clients from Wayne's practice and into Schorpp Capital Management was a huge undertaking and we appreciate all the cooperation and support that our client's showed during this transition.

We would like to mention all the services that you have at your disposal at Schorpp Capital Management.

1. Retirement Distributions— We expertly take advantage of the latest tax laws to best distribute, roll over, withdraw and secure your

401(k), IRA or other retirement plan.

2. Investment Management— We use passive index investing as a way to achieve diversification and to manage risk.
3. Retirement Planning— Our business focuses on making sure that your lifetime of savings is preserved and is fruitful during your retirement years.
4. Insurance Products-
  - Long Term Care Insurance
  - Life Insurance
  - Health Insurance
  - Disability Insurance

5. We want to mention a great product that some of our clients have taken advantage of. They have also recommended this service to their friends. It is an analysis of a client's participation in their companies 401k, 403b or 457 plan. We offer this service while the employee remains in their company plan. We recommend the correct asset allocation based on the client's risk tolerance, age and diversification needs. We then recommend the best choices available to the customer in their plan. We then estimate the value of the plan assets at retirement. We offer ways for the clients to increase their retirement assets if they feel they are short of their goals.

### 1st Quarter Market Highlights and Lowlights

The first quarter was a difficult one for everybody in the financial markets, except those invested in the energy complex. In the margins on the right we have noted some of the performance of of the major market averages.

Some of the themes we have been pushing over the past six months are still key to above average performance. The first

three are dividends, dividends and dividends. We cannot overstate enough that superior returns will be found in instruments that produce above average dividends. Also, we are strong believers in the performance of the Pharmaceuticals.

We are continuing to invest in short duration fixed income investments.

We want to take this opportunity to make sure that all of our clients have their estates in order. With all the news lately about this topic it is paramount that this part of your planning is secured. If you need a referral for an estate lawyer please contact Doug at the office.

### Tip of the Quarter

Diversification is the key to long term success in investing. We have included one of our favorite charts that we use in our practice. In the color coded boxes are different asset classes. You will notice that the top performing classes have changed often over the past 19 years. That is why it is important to have exposure to a broad range of assets to capture gains in the best performing sectors.