

COMPASS WATCH

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THE BEST COMPLIMENT

During the first quarter of 2014, we received a considerable number of phone calls from individuals who had been referred by clients and other friends of Compass. Some of this interest was undoubtedly a result of our high-quality, individually-managed stock returns last year. Others were looking for a seasoned and experienced team of portfolio managers to help them navigate their investments relating to:

- Building a Quality Portfolio
- Retirement (individual and company plans)
- Sale of a Business
- Divorce
- Inheritance
- Trust Distributions

Whatever the reason, we are delighted to field the inquiries. As a reminder, for those considering recommending Compass Capital Management, here are some basic services we provide:

OBJECTIVE SETTING/INVESTMENT POLICIES:

After an in-depth conversation with the client, we produce a written investment policy statement for each account we manage. This statement becomes the investment “road map” for the account. Because we know objectives and risk tolerances differ for each investor, portfolios will differ. There is no “one size fits all.”

STOCK MANAGEMENT: *Long term-growth*

Our core individual stock discipline emphasizes high-quality, mid-to-large capitalization multinational growth companies. We purchase them when they represent a good value for long-term wealth creation.

BOND MANAGEMENT: *Capital Appreciation, Liquidity & Income*

In managing fixed income portfolios, our bond discipline focuses on high-quality, intermediate-term bonds (that have a maturity date) including municipals, corporates and U.S. Treasuries for capital preservation, liquidity and income.

BALANCED ACCOUNT MANAGEMENT: *Growth & Income Blend*

We provide this service for clients who want the Compass team to determine the proper growth (stocks) and capital preservation (bonds) blend for their special circumstances.

CLIENT MINIMUM: *\$1 Million*

This minimum applies to client relationships, not accounts (client accounts can be aggregated together to meet the \$1 million minimum).

We continue to appreciate your referral business and encourage your friends and family to call. Inquiries are always welcome! A very special thank-you to those of you who have already recommended us over the prior 25 years!

For more information regarding our company, disciplines and results; please call, write, e-mail or visit our website: www.compasscap.com

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