LYCOS | ASSET MANAGEMENT

Is your investment professional a fiduciary?

What We Do

We are “discretionary” portfolio managers and financial advisors, based in Vancouver, British Columbia, Canada. We design investment portfolios and retirement strategies, vis-a-vis client goals and wishes.

Our Mission

Clients seek wealth management professionals that have three core qualities. First, they are fiduciary advisors; second, they place all client interests ahead of theirs; and third, they listen attentively. Our mission delivers on all three.

Our Fiduciary Role

Our fiduciary role is the long-term roadmap for each client. A fiduciary is a person who holds a relationship of trust and prudently manages money matters for other people.

Our Vision

We are often asked, “What is the best way to manage my family's serious money?”

We believe that managing serious money, such as retirement, is a long journey. The proven and consistent approach to create, grow and preserve your wealth is the long-term view.

The centerpiece for financial success is your long-term plan that outlines investment policies you will follow to reach your unique goals. Our experience is that asset mix decisions have the greatest impact on your investment portfolio over any other factor.

The foundation of investing your serious money requires discipline, objectivity, patience and clear investment policies.

In a world of confusion, we simplify the winding road to realize a better future.

Our Distinctive Philosophy

Our distinctive philosophy provides peace of mind and fosters lasting client relationships. We also write about our beliefs.

We are independent and "fee-only." We are not affiliated with institutions. We do not sell products. We are paid only by our clients.

Our advice is objective and unbiased, consistent with client goals, time horizons and risk tolerances. Our counsel is without conflicts of interest. Our integrity of counsel is uppermost.

We are not compensated by commissions or trailers to buy or sell investments. For many clients this objectivity alone is the most attractive feature for choosing us.

Client portfolios managed by us are held by separate custodian. This ensures safety of client assets and professional implementation of transactions. Clients receive transaction confirmations and statements of accounts from the custodian. These are traditional qualities that clients value.

Our Professional Services

Our professional services begin with discussing your goals and dreams. We estimate retirement capital needs. We assess risk tolerance. We confirm investment profiles. We analyze current investments. We establish your asset mix targets. We develop your long-term plan of action.

We select broadly diversified investments. We implement your plan decisions. We rebalance your portfolio to initial asset mix targets. We monitor the portfolio and report to you.

Our Invitation to You

We believe that your family wealth is best guided by a thoughtful plan that withstands the test of time. We welcome the opportunity to share our philosophy and invite you to allow us to guide your tomorrows.

Please contact us at **1.855.85.LYCOS (9267)** to discuss your situation.

FINANCIAL ADVISORS TEAM

Vancouver's distinguished financial advisors.

Lycos Asset Management is a Canadian independent investment management firm that approaches portfolios using a time-tested disciplined value approach.

For more information please visit us online at **www.lycosasset.com**

Constantine Lycos

Steve Nyvik

Rob Bisbicis