

SafeMoneyMetrics®



Using Managed Futures for Business Development. A Mini Course for Broker Dealers

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Using Managed Futures for Business Development

A Mini Course for Broker Dealers



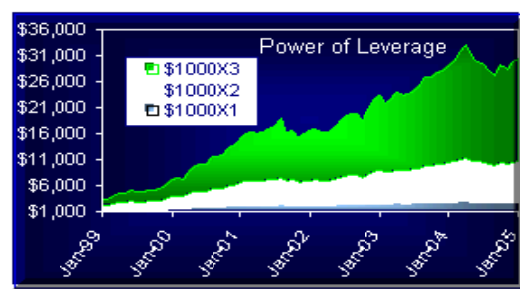
Increase Your Revenue and Market Share

- Are you a broker-dealer that clears other broker-dealers or independent advisors?
- Are you currently involved with Managed Futures?
- Are you open to NEW low risk business development strategies?
- Do you have a compelling need to increase your traditional fee based clearing revenue?

Maybe this course is useful for you!

Also read the [Mini Course for Advisors and Investors](#). WHY? Investor and advisor needs, as they relate to managed futures portrayed by the mini courses should be understood and integrated into your thinking. Knowledge offered in both courses are essential to the compliance and business development process.

The Gift of Leverage



Please read the [Mini Course for Advisors](#). The information is directed to individual advisors and NOT repeated here. It was written to stimulate thinking about how people think and believe relative to reality we create. The information is also relevant to your professional station in life, so enjoy it!

The [Mini Course for Investors](#) teaches people to search for, demand and expect more from the marketplace. People are taught to identify mediocrity and deceptive investments even when well dressed as high past performance numbers. They learn to define and locate investments with optimal performance potential. Maybe read that course too. With or without you, the information will eventually reach investors. HOW?

SafeMoneyMetrics® applied to limited risk managed futures strategies can leverage your marketing initiatives. Your traditional fee based revenue is increased as a by-product. Managed futures should never be offered to anyone as an isolated investment. Managed futures need a traditional investment foundation to maintain the honorable risk management purpose that they were created for. Nothing less is acceptable if optimal success is expected.

Managed futures can comfortably represent between three and twenty percent of a total portfolio. Managed futures are indispensable for stabilizing the volatility and risk of traditional investments. The unique value they bring to any composite strategy is indispensable. WHY this is true is detailed in [the Mini Course for Investors](#).

You have no out of pocket costs, added compliance burdens or registration requirements. To my knowledge, if futures represent less than 10% of a firms gross revenue they are exempt from registration. To get started you need an open mind and freedom from self-defeating fear based beliefs! [The Mini Courses for Investors and Advisors](#) are excellent for opening your mind and building beliefs that allow success to easily flow!

Our business development and marketing strategies are implemented at a grass root, local level. They are designed to inspire and empower every participating advisor and investor that every advisor can reach.

Why SafeMoneyMetrics®?

Content below was extracted from <http://www.safemoneymetrics.com/>. A comprehensive description of [SafeMoneyMetrics™ can be found in guide](#).

SafeMoneyMetrics® reduces and can at times prevent substantial unforeseen losses inherent with many investments by revealing information that would otherwise remain concealed.

The risk management process is a consistent direct measurement of capital at risk relative to realized return and account volatility on capital at risk, rather than total account capital. The system evolved from hedging futures and it redefines procedures currently used to select and evaluate managed futures and other high leveraged investments. Contrary to popular belief, many traditional analytical procedures, when applied to evaluating managed futures and other high leveraged investments actually increase risk of loss!

There are fundamental paradigms of reality currently perceived as “truth” used to determine investment value that actually cause unwanted losses. SafeMoneyMetrics® offers a few solutions that can prevent uninvited misfortune. These are major issues on a colossal scale, a very serious matter that needs attention! Remember that every-on and off line presentation perpetuates the exact inherent problems.

Consider a few facts:

- Past rate of return for managed futures is the foremost element for evaluating investments. A decision to invest evolves from a statistical and analytical process that includes past rate of return data.

- How past rate of return is calculated has no relevance to the Capital at Risk used to produce the rate of return. This fundamental error is only one major CAUSE of poor decisions. **For example:** Rate of return (ROR) is calculated using realized and unrealized profit and losses, interest income minus costs and includes the account size required by the advisor. The capital base, or account size used to calculate ROR is called "beginning equity." Although advisors vary, many only use anywhere between 3% and 10% of the required account size for trading. Also unrealized profits have no value to a client until they are realized. Although currently irrelevant (not always), interest income is NOT a trading return earned from capital at risk.
- Past rate of return data also has no relevance to current reality and future returns. We cannot rely on past rate of return to inform us of capital at risk relative to future returns. Nor does past rate of return offer insight into the stamina or mental acumen of our traders! The full moon has more value and influence! **For Example:** Past rate of return on a managed futures investment is nothing more than a financial scorecard that measures human skill successfully applied within a specific time and situation. The situation that allowed success partially includes market condition, perceived "trade-setup" within the market condition relative to an ability to perceive and act effectively at that specific moment. That particular situation with all detail is forever gone and will never repeat itself.
- Exceptional trading talent applied to a specific market condition allows a rate of return for managed futures to evolve, nothing more or less. Evaluating human talent and consciousness driving the talent, clearly requires different considerations than evaluating stock or bond returns.
- *Consciousness and talent have no relationship within any individual,* however understanding how both operate are mandatory for choosing successful traders. **For example,** many bright, talented people have inaccurate beliefs and/or ill intended motives driving their actions. I remember believing that doctors and lawyers always put truth and well being of their patient or client first. That inaccurate belief has caused severe losses in my life. Subtle degrees of inaccurate belief and/or ill intentions exist many remain unknown, even from ourselves. The tools for prudently evaluating and quantifying beliefs, mental acumen, skills and intention are mandatory for enduring success in any endeavor. This includes evaluating others and our self. Traditional past performance evaluation of managed futures does not even consider this statement.
- No one owns, nor will they ever own a portfolio of individual commodity futures as they would own a portfolio of individual stocks and bonds. There is no relevance to the comparison. Therefore any commodity index, especially indexes of managed futures investments, used as Benchmarks applied to evaluating a managed futures investment should be selectively considered.
- Contrary to emerging "beliefs" managed futures are NOT a hedge and DO require strict risk management supervision.
- The infamous Standard Deviation, also calculated using past rate of return only measures volatility of past return. Volatility is easily manipulated by account size and is dramatically influenced by unrealized trading returns. Both account size and unrealized returns have no relationship to capital at

risk relative to realized returns. Also larger accounts usually have less volatility, which is a function of account size NOT trading talent.

Questions we ask are: How do larger accounts equate with evaluating trading talent? Who decided that big is good? SafeMoneyMetrics® focuses on the analysis of variables that are directly meaningful and consistent in current reality. Because it only measures and analyzes real risk relative to real return it produces cleaner data and a more accurate look at forces that effect investment returns. Returns are the scorecard or result of many forces successfully coming together.

SafeMoneyMetrics® focuses on risk management at the causal level. When we eliminate the cause of a negative event, the event ceases to exist.

We have proven that statistical analysis calculated with ambiguous information applied to situations that never repeat is imbalanced human interference we need to eliminate rather than rely on. It is the objective of SafeMoneyMetrics® to bring a new paradigm for risk management that uses higher standards.

“ No power is needed to destroy error because error has within itself the elements of self-destruction” - Joel Goldsmith – Thunder of Silence

How Managed Futures and SafeMoneyMetrics® Can Meet the Following Clearing Firm Needs:

- To EARN trust of the marketplace! *****
- Trust in the people, products and service.
- Efficient low cost procedures that give freedom from unwanted high risk, costly compliance issues.
- Innovative, yet prudent risk management strategies that meet the needs of a sophisticated audience.
- Judicious education process.
- Increased competitive advantages.
- Increased revenue on traditional services.
- Leveraged marketing potential at NO additional cost.
- Easy low cost administration.
- Corporate quality control while improving opportunity for each advisor's unique expression at a local level.

To EARN trust of the marketplace!

This was written first because the information subtly (or not so subtly) is integrated into everything we do. If the discovery and market entry process was presented first, what is most important would not be accurately communicated.

Be patient and enjoy the journey!

Relationships with major clearing firms provide fiscal security to all projects and risk is always practically managed.

Delivering positive monthly returns is impossible. Delivering positive quarterly returns is less impossible, etc. etc. The goal becomes peace of mind and comfort under any performance condition!

There is a path to every goal in life. Contrary to popular belief, every path to any external goal is an internal process with consciousness as **the cause or driver**. During negative return periods, our audience will be at peace! This is the first objective on our priority list!

Revealing how managed futures can easily be used with moderation and wisdom is an obsession. Another obsession is using managed futures to empower people. Both obsessions have been integrated into a master risk management strategy.

I can prove that 90% of unforeseen losses occurring in "someone's experience" are caused by something they did or did not do! Human beliefs and thoughts dictate our behavior. Nothing else is possible!

So, prudent thorough risk management includes people learning to be aware of and manage their own "human" consciousness so success easily flows from within them!

A short list to think about is:

Investors can easily:

1. Become involved with investments based on incomplete or inaccurate information.
2. Allowing our self to be led by greed into experiences with false promises. We are blinded to the truth!
3. Close an account because we reacted to an event that triggered a fear. Knowledge of the event possibly occurring and our "probable" reaction were NOT known before the investment was made.
4. Allow myself to "believe that a belief" perpetuated by someone else that was NOT proven as truth, has been a huge blind spot of mine. For me losses manifested in the quality of health care and legal disputes with siblings. For thousands of people, losses manifest in their investments, especially managed futures.

We all love to blame anything and everything for self-inflicted ill-fated losses. Universal laws dictate that blame will come back to us as our greatest loss. Since the universe is unlimited, taking responsibility for creating everything in our life allows the potential for unlimited upside! Same universal laws different application; nothing else is possible! (Read "Science of Mind" by Ernest Holmes)

5. Allowing conscious or unconscious fears to be used by other people. We believe that someone or something outside of our self can alleviate the fear. The belief is inaccurate. Fear is only faith inverted (negative energy).
6. Decisions unknowingly dictated by fear, are costly for me. I either deprive myself of something wonderful or get into something wonderful and then deprive myself of it by allowing fear to remove me from it.

Traders:

1. Build trading strategies and give all their power to the strategy. This includes blaming the strategy when unexpected long and large losses appear. They then fix the strategy reacting to an event that was not

anticipated when the strategy was built. WE, people such as you and I GET CAUGHT in the loss! These people frighten me. I will do everything in my power to avoid them!

2. Diversified traders who claim that trading 30 markets is diversification and honest representation of modern portfolio theory! I always avoid these people because they cannot differentiate between belief and truth. Belief can create a reality, however truth will always reveal itself and the reality that was created by the 'belief' will manifest as ill-fated financial losses in managed futures.
3. Traders who compare their performance to a commodity index to prove how good they are should be avoided. Commodity people that compare investments to an index to prove their validity should also be avoided.
4. Some investments have huge account requirements that only 5% of the capital for trading. They charge management fees on the entire account and produce a teensy weensy, itsy bitsy return. These people should probably be avoided too!

This list is really long, you get the message and I need to refrain from boring you, so let's move on!

Because I have mastered screwing up God's perfection, I'm an expert and choose to teach other people how to prevent ill-fated losses! The skill is worth a small fortune for everyone because it produces positive results!

Fear will always weaken us and distort our perceptions. It distances us from truth. When we distance our self from truth we cause loss. Truth is Love or higher frequencies of energy.

Proven by physics you can learn to apply truth to any decision quickly by reading ["A Unified Foundation for Investment Selection."](#)

Our marketing and risk management strategy reduces loss at the level of cause. When the cause of ill-fated loss is removed, the loss ceases to exist. Another universal truth, I can write a book on.

Our risk management process may appear unusual because quantifying the condition of human consciousness is an unspoken, yet obvious focus. WHY? Consciousness dictates every molecule of the material world. Nothing happens without human involvement. This was true since Genesis and will be true until humanity eliminates itself from the earth. God will probably get disgusted with us and decide to start all over with a new species!

Now we can discuss the material reality of using managed futures as a business development strategy!

The Discovery and Planning Process

Every goal has a path. Preliminary conversation between us would reveal if managed futures are beneficial to your marketplace, if so to what degree. The following outline shares a path of discovery that we use. It assumes that managed

futures are useful. Time frame to completion is about three conversations over a week or two at the most!

Phase One: Needs Assessment Verbal Determination of Degree of Engagement

Components

- Identify Your Values
- Risk Evaluation – Perception and Reality
- Current Business / Benefit Mix
- Marketplace Conditions / current and Expected
- Potential Audience
- Benefit Potential

Value Delivered

- Oral Risk Assessment / Opportunity Review
- Business Development Process and SafeMoneyMetrics® is introduced
- Degree of Client Comfort is Established
- Fundamental Knowledge of the Profit Potential is Introduced

Phase Two: In-depth Analysis Written Authorization and Strategy is Defined

Components / Verification

- Current Business/Benefits Mix Relative to 10% or 15% Allocated to Managed Futures
- Current Revenue – Expected Revenue
- Compliance Procedures Assessment
- Legal environment defined *****
 - There are no state registrations for managed futures or series 3 registrants. There are blue-sky laws and state exemption filings necessary for partnerships and advisors.
 - Using your current human resources, legal services for managed futures can become a profit center for every broker-dealer. Legal fees are paid by each partnership.
- Accounting environment defined*****
 - We offer a turnkey strategy for building exempt partnerships. Accounting software is included. Although partnerships are exempt from futures registration, we believe that accounting and reporting standards should be equal to that of registered partnerships. Accounting can be another profit center for every broker-dealer.
- Project Execution Evaluation
- Alternative Risk Evaluation
- Potential Audience (Current and Future)

Value Delivered

- Solid Foundation of Trust is Established
- Multi-Perception Risk Analysis is Defined (Yours and Ours)
- Investment Strategies are Introduced
- Needs Assessment and Gap Analysis is Defined
 - Defines components necessary to achieve a goal and what is missing
- Marketing and Education Process is Defined
 - For advisors and clients
 - Clearing BD's – For BD's, Advisors and Clients (Add one level)

Phase Three: Implementation

Review and Execution:

- The strategy defined in phase two is written reviewed and revised as necessary
- The revised strategy is presented and execution

Components of Execution

- Proven Execution Methods
- Approved Marketing Strategies
- Efficient Work Processes
- Dedicated Human Resources

Value Delivered

- Reduced Fear of Loss = Increased Quality in the Daily Process
- Increased Client retention and Satisfaction
- Trust in the Relationships with High Maintenance Procedures Implemented
- Shorter Time Frame to Value Received
- Tangible Savings / Increased Cash Flow
- No Human Resource Drain

Phase Four: Review and Follow-Up Achievement Confirmation

Components

- Written Client Evaluation
- As Needed Consulting to Resolve Issues
- As Needed Business Development Strategies

Value Delivered

- Profit and Peace of Mind is Increased
- Competitive Advantages are Established
- Reduced Fear of Loss – Sponsor and Client
- Continuous Renewal and Improvement

Fiscal Security:

Again, clearing relationships with major clearing firms offer fiscal security to everyone involved.

Market Entry:

Working with your network begins after management approves the strategy previously defined. Development and implementation for each project takes between 2 to 8 weeks.

Your firm can license the entire [SafeMoneyMetrics® Risk Management](#) system including the [IP Portal](#). You receive 75% of gross revenues generated. This does not include revenues created from the actual managed futures.

The outline below defines the process used to work with each investment advisor registered with your network.

Strategic Assessment

- Company Profile – Managed futures are packaged in alignment with the advisors values and traditional investment strategy
- Strategic plan for market entry
- Values and motivators – are defined so managed futures are easily integrated
- Advisor strengths relative to the marketplace are defined
- Target market selection – recommendations are co-developed with each advisor
- Evaluation – the investment and service needs of each advisor are identified.

Market Conditions Evaluated

The following is defined for each advisor

- Their business and legal environment is evaluated
- Perceived and real barriers and costs to entry
- Time to entry
- Legal environment of the potential audience
- Tax effects of the potential audience

Partner Profiles (1 to 2 weeks)

- Align investment and service needs with potential partners (futures).
- Analyze potential partners for
 - Service and Risk Management Capabilities
 - Project Management Potential
 - Due diligence
 - Strength and Weak Point Analysis
 - Cost Analysis
- Partner (Strategy) Recommendations

Partnership / Investment Structure (6 to 8 weeks) – If private label partnerships are created the following details need definition

- Preliminary
 - Investment Structure and General Partner Defined
 - Timing, Registrations, Filings and Logistics
 - Legal needs defined
 - Financial needs and investment capacity
- Build the investment document, ProForma cash flow and required agreements
- Timing

Prepare a Marketing Package

- Collateral
- Electronic and Print Investment Information
- Response/ Client /Agent
- Account forms

Due Diligence and Service Support

- Transaction and Information Conduit
- Identify advisor and client needs, verbal, written and electronic
- New account procedures – identify and implement an efficient process

Summary

An impeccable synergy of talent comprised of prominent risk management, research and trading advisor and manager companies forged with SafeMoneyMetrics® and our risk management process, brings optimal profit and peace of mind with less risk and equal cost.

Efficient low cost procedures give freedom from unwanted high risk, costly compliance issues

Your traditional investments are built into every electronic presentation. A unique technology application uses the required compliance procedures inherent with futures to increase the market exposure of your traditional fee based services without added cost and lower risk.

The traditional inherent conflict between compliance and marketing is eliminated lowering cost and unwanted risk. Compliance and marketing become a single focus and the greatest strength of all projects.

All investment models use SafeMoneyMetrics®. SMM offers a customized and complete project management strategy. Compliance procedures required by the CFTC and NFA are built into the SMM® reports. The technology is used to integrate risk management, administration, compliance, billing and marketing as one process.

Electronic presentations allow marketing to be leveraged because links to the advisors traditional services are included. Presentations integrate traditional analysis and SafeMoneyMetrics®.

Because index data in the SafeMoneyMetrics® Analysis reports is replaced with each advisors traditional fee based portfolio, the composite model becomes a leveraged marketing initiative. [Look at Chart #16 in the analysis demo report.](#)

Ease of Risk Management and Administration

Custom SafeMoneyMetrics® functions as a complete administrative process. It can be set up to integrate individual trading advisors, composite strategies, all private label investments using a particular strategy and finally all clients that use each investment. Strategy and client files are duplicated to meet the administrative and compliance needs for each advisor and corporate headquarters.

Conservative innovative investments meet the needs of a sophisticated audience

Please think about this...

Experience, research and reflection has taught us that upper middle class America, or what's left of it, needs support to maintain and improve its status.

SafeMoneyMetrics® meet the following needs:

- **Judicious education process:** Professional knowledge is always transferred to advisors and the investing public. Even if people decide to use other firms, we sleep well knowing that anyone finding us has been empowered by the information we disseminate.
- **Corporate quality control and improved opportunity for each advisor's unique expression at a local level:** Marketing strategies are individually designed for each advisor. You maintain quality control while allowing the unique expression of each advisor to flow. Competitive advantages allow cost effective impeccable investments to flow into the marketplace.
- **Leveraged marketing potential:** Your traditional investments are given unique value to the marketplace because of managed futures and SafeMoneyMetrics®. Managed futures integrated into traditional strategies allow access to a marketplace that may otherwise remain unavailable to you.

Increased comfort optimizes the potential for positive results

Managing capital with reverence requires your comfort, as well as ours with you. We are not separate from you, and will never effectively function on your behalf without ease between us. Our philosophy is a necessary pathway to establishing clear understanding and building long-term relationships.

Financially - Value translates into increased traditional and alternative revenue with lower cost and risk.

Practically - SafeMoneyMetrics® is incorporated into all services. Our business development process is integrated into private label services, approved by management and semi customized for each investment advisor. The strategy honors a corporate need for control, while nurturing the inherent God given creative strength within each individual.

Philosophically - Strategies reduce or prevent unwanted loss and uninvited compliance issues.

Spiritually – We nurture the human spirit. Fear based paradigms of reality are transformed into productive love and wisdom.

Release of unnecessary fear and conflict has a positive effect on any physical condition. The process begins from within each individual and extends outward to variable degrees of relationship with the environment. What we do confirms the truth of what we are. A healthy consciousness or state of being is a foundation that strengthens any material circumstance.

Business with reverence is strategy whose time has arrived. If we are mindful to deeper implications, the potential to strengthen generations of people within a fear-based society is immense.

Revenue Growth and Time

This course is directed to two types of broker-dealers; clearing firms and broker-dealers that clear independent advisors. Compensation assumptions for both are the same, the only exception being volume. We allocated 0.50% to both types of broker-dealers. Circumstances may dictate that clearing BD's and their broker-dealer clients each receive 0.25%.

These are conservative generic revenue models that can be redesign to accurately reflect your marketplace. Because the number of participating advisors is low, we believe that the models are conservative.

Assumptions: Clearing Broker Dealers

1. Data represents 10 broker-dealers each having 10 advisors using the following strategy.

a) Year 1 - \$200,000 in Managed accounts or a Turnkey Partnership - 2.5% annual fee is paid to the advisor.

b) Year 2 and thereafter - annual additions of \$300,000 into managed account or one private label partnership at a 2.5% annual fee is paid to the advisor.

c) Year 3 and thereafter – annual additions of \$500,000 into managed accounts or the partnership at a 2.5% annual fee paid to the advisor.

2. You as Clearing Broker receive 0.50% of total assets.

3. 20% annual return on equity.

4. The 20% annual return is included in the equity growth and compensation for the following year.

5. The Profit Center for Legal and Accounting is not included.

6. Revenue from the traditional investment base is not included.

7. Revenue for Licensing SafeMoneyMetrics® is also not included.

Clearing Firms - 10 Broker-Dealers With 10 Advisors Each				
Date	10 BD's10 Adv	Total Equity	20% ROR	Clearing BD 50%
Yr1	\$20,000,000	\$20,000,000	\$24,000,000	\$150,000
Yr2	\$30,000,000	\$54,000,000	\$64,800,000	\$405,000
Yr3	\$50,000,000	\$114,800,000	\$137,760,000	\$861,000
Yr4	\$50,000,000	\$187,760,000	\$225,312,000	\$1,408,200
Yr5	\$50,000,000	\$275,312,000	\$330,374,400	\$2,064,840
Yr6	\$50,000,000	\$380,374,400	\$456,449,280	\$2,852,808
Yr7	\$50,000,000	\$506,449,280	\$607,739,136	\$3,798,370
Yr8	\$50,000,000	\$657,739,136	\$789,286,963	\$4,933,044
Yr9	\$50,000,000	\$839,286,963	\$1,007,144,356	\$6,294,652
Yr10	\$50,000,000	\$1,057,144,356	\$1,268,573,227	\$7,928,583

Assumptions: Broker Dealers Who Clear Advisors

1. Data represents 10 advisors using the following strategy.

a) Year 1 - \$200,000 Managed Accounts or Turnkey Partnership - 2.5% annual fee is paid the advisor.

b) Year 2 and thereafter - annual additions of \$300,000 into managed accounts or one private label partnership at a 2.5% annual fee is paid to the advisor.

c) Year 3 and thereafter – annual additions of \$500,000 at a 2.5% annual fee paid to the advisor.

2. You as broker-dealer receive 0.50% of total assets.

3. 20% annual return on equity.

4. The 20% annual return is included in the equity growth and compensation for the following year.

5. The Profit Center for Legal and Accounting is not included.
6. Revenue from the traditional investment base is not included.
7. Revenue for Licensing SafeMoneyMetrics® is also not included.

Date	New Cap.10 Adv	Total Equity	20% ROR	BD .50%
Year 1	\$2,000,000.00	\$2,000,000.00	\$2,400,000.00	\$10,000.00
Year 2	3,000,000.00	\$5,400,000.00	\$6,480,000.00	\$27,000.00
Year 3	5,000,000.00	\$11,480,000.00	\$13,776,000.00	\$57,400.00
Year 4	5,000,000.00	\$18,776,000.00	\$22,531,200.00	\$93,880.00
Year 5	5,000,000.00	\$27,531,200.00	\$33,037,440.00	\$137,656.00
Year 6	5,000,000.00	\$38,037,440.00	\$45,644,928.00	\$190,187.20
Year 7	5,000,000.00	\$50,644,928.00	\$60,773,913.60	\$253,224.64
Year 8	5,000,000.00	\$65,773,913.60	\$78,928,696.32	\$328,869.57
Year 9	5,000,000.00	\$83,928,696.32	\$100,714,435.58	\$419,643.48
Year 10	5,000,000.00	\$105,714,435.58	\$126,857,322.70	\$528,572.18

Why SafeMoneyMetrics?

A few benefits of choosing us for partners are listed below. Any service is only as good as the people involved. Some people just create money. Money is OK, however I believe we're all here to give more! If managed futures can also be used as a medium to empower people, what can I say, except thanks for helping us create a bit more of heaven on earth for everyone we serve!

1. **SafeMoneyMetrics®:** is unique and exclusive to our team. It reduces or sometimes prevents unforeseen losses by revealing risk and pertinent information that would otherwise remain concealed. [Read a guide to SafeMoneyMetrics®](#) and take time with [Why You Benefit](#)
2. **Awareness of Analytical Applications:** The first index was created by Charles Dow. Its' purpose was to time the entry and exit of stock trades, NOT compare investments. Modern Portfolio Theory was originally created to use with investments such as bonds and other risk free financial instruments.

Imagine using a flu vaccine to prevent allergies. How effective can the results be? Being aware of "Intention, application and the power of belief, relative to Universal Laws" are the most useful methods of risk management available to mankind. (Read the Power of Intention by Dr. Wayne Dyer. <http://www.drwaynedyer.com/products>)

Much of the industry uses indexes and benchmarks to compare investments, NOT time them. Positive results can ONLY be created from accurate information wisely applied. We believe that a major cause of loss and misinformation perpetuated throughout the investment industry relates to the application of benchmarks and indexes. We have done our best to prudently use benchmark applications that enhance the potential profitability of client accounts.

3. My (MJJ) professional experience speaks for itself and can be located at any of our [web sites](#). More detail is available in the [Sanctity Capital Management Disclosure Document](#).

4. Although Christian Ramsey is not directly involved with futures, his professional background can be located at any of [our web sites](#). Ramsey is well known throughout the traditional advisor community as founder of [Series7News](#).
5. **Experience:** Sometimes wisdom comes with experience and sometimes it doesn't! We have over 30 cumulative years between us and sometimes we are wise! Wisdom creates money by preventing frivolous loss!
6. **Independent Trading Manager and Risk Management:** We are independent from each other, all advisors and clearing firms. Performance potential is enhanced by the cold objectivity and individual perspectives integrated and brought to all services we offer.
7. **Comprehensive Education:** We have and always will do everything in our power to transfer professional knowledge and insight to our marketplace.

This concludes the Mini Course for Business Development. We hope you found it useful. We also have a [Mini Course for Investors and one for Advisors](#).



Do you want superior managed futures investments?

Always Use SafeMoneyMetrics!®
<http://www.safemoneymetrics.com>

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