

# Portfolio's That Maximize The Probability of High Performance

This week we're preparing for our upcoming September Options Webcast. Here at Iron Gate we consistently preach the value of a thoughtfully devised and executed options strategy to accompany your core portfolio efforts.

Options can be the key to the difference between mediocrity and over-performance for many portfolios primarily because of their ability to generate income when income is often scarce, and secondarily because they can provide a valuable hedge to your core portfolio holdings when managed properly.

If you aren't using options, you should be. If you are, this upcoming webcast will provide an excellent opportunity to refine your options process and improve your approach to options. Plus the question and answer portion of the webcast will be valuable for anyone wanting to dive deeper.

## **Register For the September 21st Iron Gate Options Webcast**

And here is a valuable refresher, or tip of the iceberg if you will, on what options can be doing for your portfolio:

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# What is the Value of a Dollar?

Those that don't study history are doomed to repeat the same mistakes made in the past.

How many times have you heard this phrase or something similar?

This is why we study history at Iron Gate Global. If we look at the past it can give us an idea of what may happen in the future.

Take income investing for example. Academia has this notion that the older you get the more income type investments you should own. For example, when you're 60 years old you should have approximately 60% of your portfolio in bonds.

We couldn't disagree more with academia.

The amount you should have in classic income type investments (bonds and dividend stocks) depends on your goals and the need to grow your money.

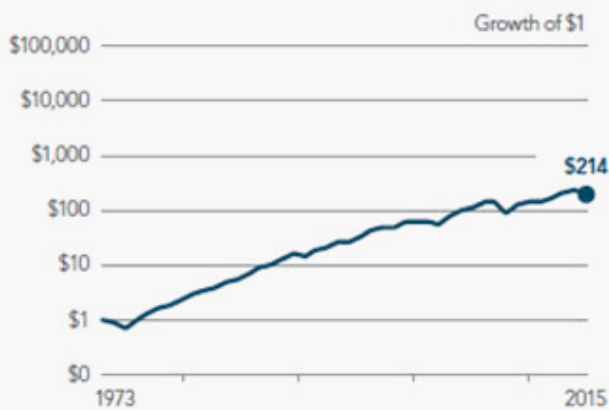
Here's what history has shown regarding the value of \$1.00 over time using different asset allocations.

As you review the returns, ask yourself the question, what type of return do I need to accomplish my financial goals?

If you don't know what type of allocation you should have, contact us. That's what we do, help people build a portfolio that allows them to accomplish their goals.

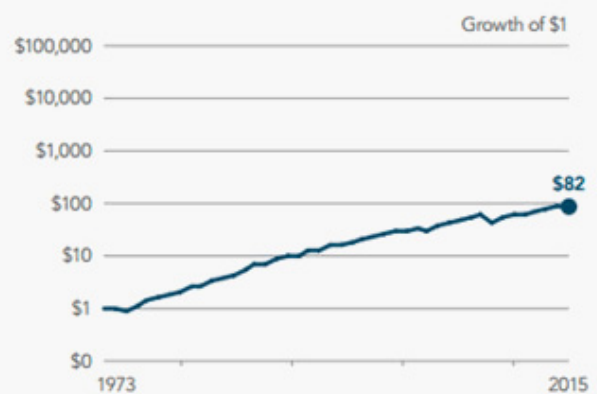
## Balanced Strategy: Equity 100% Equity

1973–2015: Total Returns (%)



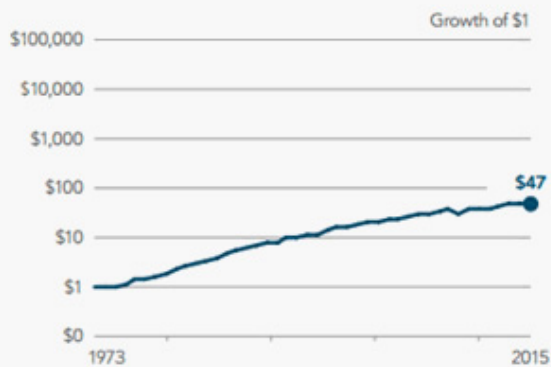
## Balanced Strategy: Normal 60% Equity, 40% Fixed Income

1973–2015: Total Returns (%)



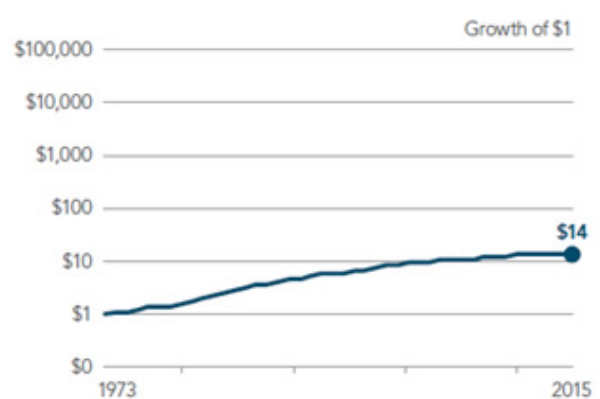
## Balanced Strategy: Moderate 40% Equity, 60% Fixed Income

1973–2015: Total Returns (%)



## Balanced Strategy: Fixed 100% Fixed Income

1973–2015: Total Returns (%)



## Dow Jones US Select REIT Index

1978–2015: Real Returns (%) (Inflation Adjusted)



Data provided by Dow Jones Indexes.

## What We're Reading

**Latest memo from Howard Marks: Political Reality** – Howard Marks is one of our favorite investors to read and learn from. Any time he comes out with a memo it is required reading for us. It's similar to the Berkshire Hathaway Annual Report in our eyes. This memo is another classic that gets you thinking.

[Click here to read the full article.](#)

**3 Things All Self-Directed Investors Should Know** – This is an instant classic! Once you see the author we are sure you will agree! If you are managing any of your own money these three items are vital for you to understand. [Read it here.](#)

**11 Common Medicare Mistakes** – If you're in that stage of life where Medicare plays a role, please read this. It's important for you to understand some of the common mistakes that come from a confusing program. [Read the article here.](#)