MATSON MONEY
Mark Matson
Founder and CEO

Many investors are facing a myriad of circumstances that can create a perfect storm to threaten their long-term financial goals. Between war, rising inflation, and a wavering economy, uncertainty is looming in the minds of many investors, who may be contemplating pulling their money from the market or making other potentially risky decisions around their financial future.

When it comes to investing, it is human nature for many investors to panic when markets are volatile. It takes courage and fortitude for investors to stay disciplined with their long-term investing strategy – something not easily accomplished on their own.

Financial advisors have an opportunity to be a stand for their clients, encouraging them to stay prudent and disciplined over a lifetime. Investors need leadership and coaching from their financial advisors now more than ever. They need to know the difference between a prudent globally-diversified portfolio and speculating and gambling with their future.

Coaching investors to have a long-term investing strategy – and stick with it over a lifetime – can transform the investing experience for families and create the freedom for them to pursue their American Dream. At Matson Money, we are committed to saving families from speculating and gambling with their money through the steadfast execution of academic investing principles and ongoing coaching and education.

matsonmoney
Life on purpose

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Matson Money is a multi-generational Registered Investment Advisor company founded in 1991 by Mark Matson. Over the last 30 years, Matson Money has trained and developed advisors to help their clients have confidence in their long-term investing strategy through the application of empirically tested Nobel Prize-winning academic investing principles and behavioral science.

To help shield families from speculating and gambling with their life's savings, Matson Money has developed a comprehensive and disciplined investing methodology, the Matson Method, that integrates leading research in behavioral economics, finance, and the field of human performance into an innovative and powerful investing science. The Matson Method helps create portfolios designed and engineered to systematically capture market returns. Our portfolios are globally diversified and systematically evaluated for rebalancing needs according to the investor's desired risk-tolerance. This approach is designed to eliminate the myths of stock-picking and market-timing from portfolio management.

The Matson Method is two-fold—fully including both the scientific and human dimensions of wealth creation. To help transform the investing experience for families and help advisors create lifelong clients, we have reimagined the advisor-client relationship into an ongoing coaching relationship. Advisor coaches working with Matson help empower investors to not panic when life circumstances, world events, market volatility, or any other contributing factor can trigger fear and uncertainty around their financial future.

When it comes to investing, there is no fast and easy solution. Coaching, however, is an indispensable tool that can powerfully develop investors to be disciplined and prudent. Many people who have great results in life, have found a coach or mentor to help guide them, give input, observe, correct, and motivate over a lifetime. The power of coaching as a strategy to succeed is powerful and can be a secret weapon for long-term wealth creation.

All investing involves risks and costs. Your advisor can provide you with more information about the risks and costs associated with specific programs. Your advisor is not affiliated with Matson Money, Inc. The information contained in this content is for educational purposes only and is not intended as investment advice. No investment strategy (including asset allocation and diversification strategies) can ensure peace of mind, guarantee profit, or protect against loss.

New business contact:
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Brand of program: Matson Money
Type of program: Investor coaching company providing discretionary management of globally diversified portfolios
Total assets in program: $9 billion*
Year program began: 1991
Managers on platform vetted: Yes
Managers GIPS® compliant: Yes
Type of products available: Managed portfolios for all account types as well as a VA policy through TIAA-CREF, all invested in mutual funds advised by Matson Money
Program uses platform to track reporting of client holdings: Yes
Program is compatible for: Multiple advisory channels
Program optimizes for tax and trading efficiency: Not relevant to the Matson Method
Sleeve-level reporting: N/A
Program links to a trade execution or order management system: N/A
Program links to a trust accounting system: No
Private branding or white labeling possible: Yes (additional cost)
Proposal generator: Yes
Generates investment policy statements: Yes
Asset allocation methodologies: Structured Market Portfolios use precise asset classes to capture the returns of unique dimensions of the market. These asset class funds do not attempt to predict the future, but provide unique investor outcomes focused closely on trading costs without "forced" trading.
Rebalancing: Yes (quarterly review)
Aggregation of held-away accounts: No
Custodians supported: Charles Schwab, Axos Advisor Services, Pershing Advisor Solutions, TIAA-CREF (VA policy provider)
Marketing support offered: Yes, ongoing coaching and educational materials

*AUM is subject to change due to fluctuation in market performance. AUM is $9,061,202,681.85 as of 11/14/2022.