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Creating an Investment Policy Statement: Guidelines and Templates

By Norman Boone, MBA, CFP® and Linda S. Lubitz, CFP®

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- setting objectives
- defining the asset allocation policy
- establishing management procedures
- determining communication procedures

The second section provides application of the process with sample investment policy statements for different types of clients, each containing six components; factual account information, investment objectives, asset classes, asset allocation, selection monitoring and control procedures, and signatures.

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