

# Risk-managed investment solutions

Brookstone Capital Management has created an investment approach that emphasizes risk-managed portfolios designed to meet the specific needs and risk tolerance of clients.

## Company Profile

We offer the expertise and customized solutions to help investors build long-term, risk-managed portfolios tailored to meet their unique financial goals.

# 2006

Founded in Wheaton, IL  
by Dean Zayed

# 1,000+

Advisors supported

# 80k+

Client accounts  
serviced annually

# \$7.5B+

Asset under management  
as of December, 2022

[brookstonecm.com](http://brookstonecm.com)

## Our Mission

As a fiduciary, we strive to conduct our business according to the highest standards of honesty, integrity, and fairness. Our ultimate goal is to continually maintain that your best interests are the foundation of your financial planning. We do this by attempting to provide a consistent and structured approach to your financial needs that will result in an integrated and customized solution for you.

## Methodology

Our risk-management investment approach seeks to protect and grow wealth.

### Balanced Philosophy

We believe that it's critical to defend against the devastating impact large drawdowns can have on the long-term growth of an investment portfolio. We therefore develop and implement investment strategies specifically geared toward our client's unique investment goals as well as their tolerance for risk.

### Strategy Diversification

Our approach is based on using varied strategies to help minimize downside risk. While each of our strategies has its own methodology, our main goal is to limit large-scale losses. We believe that diversification across multiple risk-controlled strategies helps manage wealth for both performance and protection.

### Risk-Managed Strategy

Our investment approach seeks to preserve and grow wealth across market cycles. It considers each client's risk tolerance and focuses on strategies that manage risk and attempts to limit large losses by utilizing strategies with low correlation to broader volatile market activity.

## Leadership

Our leadership team has made Brookstone an industry leading RIA by putting the needs of our advisors and their clients first.



**Dean Zayed**  
CEO, Founder



**Darryl Ronconi**  
President, COO



**Mark DiOrio, CFA**  
Chief Investment Officer



**Matt Lovett**  
Chief Compliance Officer