

# Winans Investment Shares a Proven Track Record of Guiding Clients Through Inflationary Times

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[Winans Investment \(WI\)](#) shares a proven track record helping clients through inflationary pressures. Founded in 1992 by visionary entrepreneur Kenneth G. Winans, WI leverages decades of expertise and proprietary research to deliver customized investment strategies tailored to each client's needs.

Ken Winans, a true trailblazer, left a promising career at Merrill Lynch to establish an independent advisory practice designed to address the shortcomings of traditional Wall Street investment management. Starting with just seven clients and operating from his home, Winans envisioned a firm that prioritized personalized service and proactive strategies.

## A Distinctive Approach to Investment Management

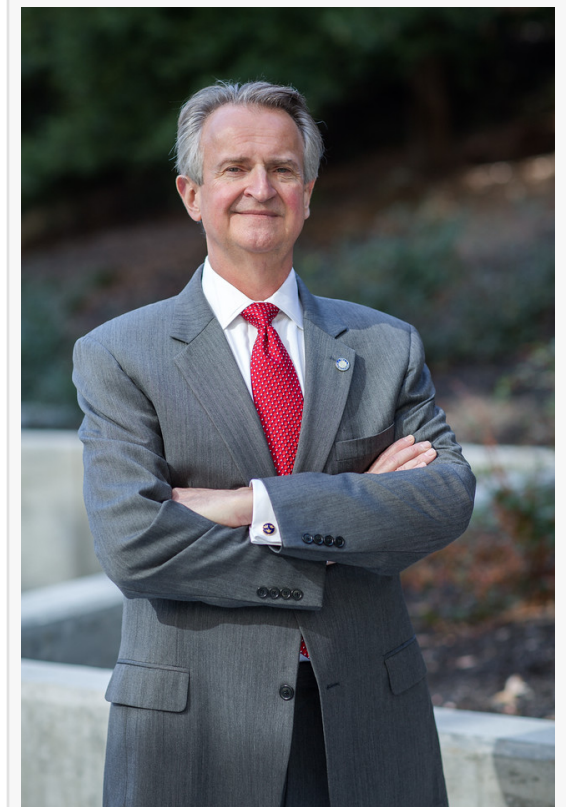
Unlike the impersonal, "one-size-fits-all" asset management approach often found on Wall Street, WI employs a tailored portfolio management style that adapts to the unique circumstances of each client. This includes:

- **Defensive Strategies During Downturns:** WI uses proprietary historical research to identify market cycles and minimize losses by selling investments early during financial downturns.
- **Customized Portfolios:** Each portfolio is designed to meet the complex and evolving needs of the client, ensuring investments align with both short-term objectives and long-term goals.

This innovative approach has positioned WI as a trusted partner for clients seeking stability and growth during turbulent economic times.

## Proven Excellence Recognized by Morningstar®

Since 2017, Morningstar®, a prestigious global rating firm, has evaluated the performance of WI's portfolios. With over 10,882 advisor-managed portfolios in its Separate Managed Account (SMA)



database, Morningstar's "5-Star" rating is reserved for the top-performing 1% of portfolios. As of 2022, all five of WI's portfolio composites—spanning stock, asset-allocated, and bond portfolios—have consistently earned Morningstar's highest Gold or 5-star ratings across multiple time periods. This recognition highlights the firm's exceptional ability to outperform benchmarks and deliver superior results for its clients.

### Navigating Inflationary Times

WI's ability to guide clients through inflationary periods is grounded in its commitment to proactive management and rigorous research. By focusing on market trends and economic indicators, the firm ensures that clients are well-positioned to protect their wealth while capitalizing on opportunities for growth.

"In times of inflation, a reactive approach is not enough," says Ken Winans. "Our clients benefit from strategies that anticipate challenges and adapt to changing conditions, giving them the confidence to navigate uncertain times."

### About Winans Investment

Founded in 1992, Winans Investment is a leading independent investment advisory firm dedicated to providing customized portfolio management for private and institutional clients. With a commitment to innovation, personalized service, and superior performance, WI has grown from managing just seven clients to serving hundreds nationwide.

Leveraging proprietary historical research and market insights, WI specializes in designing defensive strategies and tailored portfolios that help clients achieve their financial goals. Recognized with Morningstar®'s coveted 5-star ratings, WI is a trusted name in investment management, known for delivering exceptional results during both stable and volatile economic periods.

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