

HILLSIDE IN THE NEWS

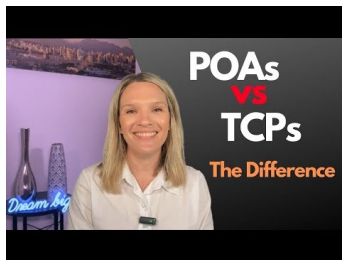
Jason recently returned as a guest on BNN's Market Call to discuss global markets.

Watch the [entire episode online HERE](#).



POWER OF ATTORNEY OR TRUSTED CONTACT PERSON - WHAT'S THE DIFFERENCE?

Amanda Baxter, Investment Advisor at Hillside Wealth, explains the key differences between Powers of Attorney (POAs) and Trusted Contact Persons (TCPs). [Watch to learn more HERE!](#)



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CELEBRATING A DECADE OF HILLSIDE PERFORMANCE

Jason Del Vicario, CFA®

We have achieved a major milestone for Hillside Wealth Management as September 2, 2024, marks the 10th Performance Anniversary of our Hillside Focus, Balanced, and Conservative model portfolios.

What better time to get back to basics? Below are a few key insights we've gained over the past decade managing our clients' hard-earned capital:

Accumulating Wealth is Simple

1. Spend less than you earn.
2. Invest the difference. We recommend a concentrated basket of high-quality stocks.
3. Hold, and when cash flow allows or stock prices dip, add to your investments.
4. Wash, rinse, repeat.

In line with this, we've established three core rules at Hillside:

1. Don't invest short-term money in stocks.
2. Don't leave long-term money in cash.
3. Don't check your portfolio daily, weekly, or even monthly. We don't track the price of our house hourly—so why treat our retirement or other financial goals any differently?

A Sneak Peek at a Decade of Results

Without predicting the future based solely on the past, here are a few key statistics from our first decade of managing concentrated portfolios of high-quality businesses:

1. We've experienced a negative year once every 3-4 years.
2. We've underperformed our benchmark approximately once every three years.

Despite these fluctuations, our process has outperformed the benchmarks over the past 10 years, and we have every reason to believe and trust that this trend will continue.

Lastly, we eat our own cooking! On a personal note, my family's assets are invested in the Hillside Focus Model.

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