



A Letter from Our Chief Executive Officer

All investment advisory firms seem to promote the same elements: top performance, technology, research, financial planning and the ultimate element, trust. So, what differentiates us at Westport Resources?

We begin all of our relationships with an organized conversation around your goals, your risk tolerances and our assessment of whether there is a good fit between us and how we can successfully meet your needs. Unlike other firms that may require you to fill out a form or check a box for information, we discover together how you define terms like “risk” and “priorities.” Our interactive process helps us understand how you think about your financial picture and your dreams for the future.

Your primary goals are as important to us as they are to you: educating your children, enjoying a comfortable retirement, and protecting your family now and in the future. We also want to understand those goals unique to you: the special extended family celebration you want to plan, a career challenge, acquiring that cottage on the water, or your desire to start traveling by private jet.

Once we both understand your unique goals, we can then determine how best to approach positioning of your assets. Our objective is to define the target rate of return required to meet your stated goals. If that target is achievable with the resources we can provide, we have a fit. If we have achieved a rapport that warrants entrusting us with being your partner, we move forward.

Once we establish our relationship, we engage our in-house portfolio managers, who have earned third-party documented top world rankings. You will have direct contact with our portfolio managers and they are accountable to you. While this is unique in the marketplace, it is an integral part of our process.

For more than 22 years, we have demonstrated the integrity required to prosper. Most of our new relationships are referred to us by our current clients. The true test, however, is whether you believe we can work successfully together to achieve your goals.

I hope you will take the steps necessary to explore this opportunity. It just might make the difference.

John Adams Vaccaro, CFP®, CLU