

# EDITOR'S NOTE

## INVESTMENTS & WEALTH MONITOR

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Anthony B. Davidow

In this issue of the *Investments & Wealth Monitor*, we explore advanced portfolio construction tools and techniques. We examine some of the limitations of the traditional approaches to building portfolios, and we consider new ways of helping clients achieve their goals using advanced strategies and an expanded set of investment options.

We begin with editorial board member and frequent contributor Bruce Stewart, whose article, “Managing the Client Mandate: Integration of Portfolio Investment Capture to the Investment Policy Statement Process,” presents a new way for advisors to measure risk-adjusted results. Benjamin Doty, W. J. Rossi, and Chandler Norder explore “Considering All Options for Bonds: Challenges to the 40 Percent of the 60/40”; and Brian Griggs and Quinn Brody examine “Fixing the 40: A New Perspective on the Traditional 60/40 Portfolio.”

Sébastien Page addresses “When Diversification Fails,” and John Bryson and

Keith Van Etten offer insights with “Avoid These Five Decision Traps to Improve Your Investing.” Tom Bratkovich and Sarah Woo provide their perspective on “Private-Market Investing: Implications for Portfolio Construction,” Matt Belnap shares Cerulli research in “Surveys Show Advisors Underestimate Clients’ Interest in ESG,” and Aaron Filbeck explores due diligence for investments that use artificial intelligence with the article “Artificial Intelligence: Rage Against the Machinewashing.”

*Investments & Wealth Monitor* asked frequent contributor Dana Aspach and editorial board member Moe Allain questions about “Managing Retirement Assets,” and we also asked Jim Sandidge, Derek Tharp, and Bob Powell to address the “Limitations of Monte Carlo Analysis.” We close this issue with Morgan Pearsall’s article, “Defeating Retirement: A New Approach to Retirement Asset Allocation.”

As always, we welcome your input regarding the current issue and topics that you would like us to consider in future issues. Feel free to reach out to Debbie Noehlin, editorial director, or me directly.

**Anthony B. Davidow**, CIMA®  
Chair, *Investments & Wealth Monitor*  
Editorial Advisory Board

## EDITORIAL CALENDAR

NOVEMBER/DECEMBER 2021

[ EDITORIAL FOCUS ]

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Investment Management

MARCH/APRIL 2022

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Demographics