Our Investment Philosophy

Allworth Airline Advisors' Philosophy

Our process is designed to ensure that your portfolio is aligned with our straightforward, proactive, and versatile investment philosophy:

We'll build you a diversified savings and investment strategy that we believe will help you achieve your goals and enjoy your life and retirement to the fullest.

Macro Inputs	Data Analysis	Asset Allocation Framework	Manager Selection and Due Diligence	Rebalancing and Ongoing Monitoring
• Investment data • Allworth Recession Index	• Qualitative view • Quantitative outlook	• Portfolio optimization • Scenario analysis	• Proprietary fund scorecard • Manager interviews	• Disciplined rebalancing process • Portfolio monitoring

Your Investment Committee

Allworth Airline Advisors strives to give you and your family the right advice to help make your retirement as worry-free as possible. With an average of more than 25 years of industry experience, our dedicated, in-house investment committee utilizes discipline, education, and technology to build portfolios with the overarching purpose of protecting your hard-earned money against the risk of loss and capturing growth potential.

Andrew Stout, CFA, CFP®, MBA
Chief Investment Officer

Ryan Gromatzky, MBA
Director of Research

Andrew Gularte
Investment Specialist

David Schauer, CFA, CFP®, MSFA
Chief Market Strategist

Scott Hanson, CFP®
Co-Founder

Pete Engelken, CPA, MBA
Chief Operating Officer

Kat Schraeder, CFP®
SVP of Client Relations

Bob Frater, CFP®
Partner Advisor

Corey Gamble, CRCP, IACCP
Chief Compliance Officer

Victoria Bogner, CFA, CFP®, AIF®
Partner Advisor

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