

## OVERVIEW

BLUE LINE INVESTING® (BLI) is an actively managed investment process that pursues our mission by combining a *trend following* investment philosophy and a “buy low, sell high” investment strategy. Our mission is to grow our client’s financial wealth over a full market cycle in a risk-managed and tax-efficient way.

To pursue growth, we first identify the primary trend of the financial market and identify whether it is experiencing a rising trend, declining trend, or sideways trend. We buy those investments we believe are experiencing rising or sideways trends and avoid those in declining trends.

To manage risk, there will be times when our strategies will not remain fully invested, preferring to hold cash equivalent investments instead. We believe Warren Buffett said it best with his two rules: **“Rule No. 1 – Never lose money. Rule No. 2 – Never forget Rule No. 1.”**

To pursue tax-efficiency, we buy Exchange-Traded Funds (ETFs) and individual stocks. We do not invest in mutual funds.

## INVESTMENT TREND EXAMPLE



Chart courtesy of StockCharts.com

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## INVESTMENT PERSONNEL

Jeffrey D. Link  
*Founder, Portfolio Manager*  
*(24 years experience)*

Jeff began his career as an Investment Consulting Analyst at Smith Barney in 1996. Shortly thereafter he became a licensed Financial Advisor in 1997, and during his career has represented various publicly-traded companies including Stifel Nicolaus and Legg Mason. Currently he works as an Investment Advisor Representative for Guardian Wealth Advisors, LLC, a Registered Investment Advisor (RIA) registered with the Securities and Exchange Commission.

Jeff graduated cum laude from the University at Buffalo in Buffalo, New York in 1995 with a B.A. in Business Administration, with minors in Finance and Marketing.

In 2020 Jeff self-published his first book **Protecting The Pig: How Stock Market Trends Reveal the Way to Grow and Preserve your Wealth.**

For more information please visit [BlueLineInvesting.com](http://BlueLineInvesting.com) and [ProtectingThePig.com](http://ProtectingThePig.com).