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*“No bird soars  
too high if he  
soars with his  
own wings.”*

William Blake  
(1757 - 1827)

## Why am I starting a newsletter?

*Part of the reason ... it's far too quiet around here.*

When I worked at Merrill Lynch and then, at PaineWebber (which became UBS), I was a stockbroker. Yes, my title was Financial Consultant at Merrill Lynch and Financial Advisor at UBS, but I was still, as is everyone else there with those titles, a stockbroker. That meant my job primarily involved calling my clients and recommending they buy or sell something. If they agreed, a commission was charged, part of which was passed on to me.

Now that I am an independent Investment Advisor, directly registered with the SEC, I no longer sell securities for a commission. In fact, as a Registered Investment Advisor, I am legally forbidden to engage in any activity that creates a conflict of interest with my clients. Selling anything for a commission produces a conflict of interest.

So now, I manage my clients' portfolios for a fee, which means I make decisions to buy or sell investments I believe will preserve and increase their wealth. As their wealth is preserved and increased, my income is preserved and increased accordingly. Thus my clients and I share the same interests in the results of my efforts. Since I am not calling my clients as regularly as I did as a stockbroker, it's remarkably quiet around here every day.

*Just because it's quiet, doesn't mean we aren't very busy.* I take the responsibility for my clients' prosperity very seriously. So, I spend my day researching and assessing investment possibilities for all my clients and when appropriate buying or selling investments to achieve their lifestyle and wealth management goals.

A primary goal of this newsletter is to share the process behind what I am doing, what I am researching and learning, and how I am applying all of this to each client's wealth management goals. Rather than add to the volume of mail you receive every day in your mailbox, I will be including these newsletters as part of my Website ([www.eaglewealthmgt.com](http://www.eaglewealthmgt.com)) where you can access them on your computer, at your convenience. If you'd rather receive them by mail, please give us a call and we'll send them to you that way.

I would especially appreciate hearing back from you on this form of communication. In particular, please let me know of topics you'd be interested in having me address in future issues.

Warm Regards

*Jette*  
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