

Brent Wilsey Puts All His Eggs in Equities

Wilsey Asset Management

Wilsey Asset Management's President Brent Wilsey is not your average investment advisor. Unlike many advisors, who shy away from equities for older clients, he believes age is irrelevant if proper due diligence and company selection are done. For this reason, he invests clients' money, and his own, primarily in equities.

Over his 40 years in the business, Wilsey has found value stocks provide the best long-term return. "Don't think of it as buying stocks," he tells clients wary of the risk. "Think of it as owning small pieces of great companies."

Along with Chase Wilsey, his son and the firm's Financial Analyst, Brent spends enormous amounts of time researching companies. "When considering a buy, we first look for a reason to not invest," he says. "If there's something which could present a problem down the road, we don't buy."

Learning from market history

One of Brent's rules is not buying 'hyped' stocks trading at 12 or more times the company's earnings. "Since 1870, the market has constantly shown that when a stock soars, it will crash," he notes.

Brent calls his transparent approach "common sense investing," which includes educating clients. "We illustrate how to invest in equities, why (if done



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properly) it is not as risky as it appears, and how equities offer the best returns over the long run."

The firm provides clients with daily updates, a weekly newsletter and quarterly symposiums to share what is going on in the world of finance, economics and in the companies held in their portfolio.

Less is more

Brent always recommends a balanced portfolio. "Our portfolio normally consists of 15-18 companies," he explains. "That's the magic range for

the best return. A major part of Warren Buffett's overall portfolio consists of investing in 10-12 companies. The idea is to buy quality companies, not quantity."

Brent and Chase are known in the San Diego area for their "Smart Investing" call-in radio show on AM760, and their guest appearances on the KUSI News, One America News Network, FOX Business and Fox 5 TV programs.

By starting his career in the accounting field, Brent is skilled at studying company financial reports. "We look at what a business may be worth 3-5 years down the road."

The approach works. Wilsey Asset Management, which has nearly \$300 million in assets under management, was featured in the Top 20 Investment Advisors in San Diego list (out of 313 firms) in both 2018 and 2019. "This is not advertising for which you pay to appear on the list," Brent explains. "They perform their own research." An even better mark of the firm's success is its 97 percent client retention rate.

Wilsey Asset Management is registered with the Securities and Exchange Commission and provides only fee-based services. Accounts are managed on a fee basis, when the client does better, Wilsey Asset Management does better. "We don't sell commissioned products," Brent says. "We have a fiduciary responsibility to invest in our clients' best interests."



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