

The DRL Group: Experts in Municipal Bonds

ASSET CLASS SPECIALISTS HELP CLIENTS CREATE STEADY INCOMES.



David Loesch, Principal and Co-Owner

AWARD-WINNING WEALTH MANAGERS

The National Association of Board Certified Advisory Practices and the Houston Business Journal have both named The DRL Group as one of the area's Top Wealth Managers multiple times. The group has also been showcased as a Best Business of Katy, Texas, for four consecutive years.

The DRL Group
Fixed Income Specialists

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The benefits of investing in municipal bonds, one category of fixed income securities, are plentiful. A steady income stream. Capital preservation. Tax-exempt investing. Low volatility. Liquidity. Insured principal and interest payments. Furthermore, the purchase of municipal bonds provides funding for municipalities and government entities in order to support essential public service projects. Issuers repay investors in full upon bond maturity in addition to paying a specified rate of tax-free interest annually during the life of the bond. Municipal bond portfolios can provide significant tax-exempt income over time.

In Houston, the award-winning investment experts of The DRL Group specialize in bonds. Approximately 80 percent of their transactions are in the tax-free sector, and out of those, nearly 75 percent are insured. The group's niche is acquiring bonds from dealers and allocating them into retail accounts, creating customized bond portfolios that preserve capital while insulating clients from unpredictable market environments. They believe so strongly in this asset class that bonds are the only financial product they deal in.

"We are Masters of One," says David Loesch, Registered Representative, Principal, and Co-Owner of The DRL Group. "We focus exclusively on bonds, and we've spent decades building our expertise. Our competitors juggle a range of services and products, and as a result, they are, ultimately, Masters of None."

A STABLE ASSET

Bonds are a practical investment vehicle for just about anyone, although a majority of The DRL Group's clients are retired executives, business owners, and high net worth individuals. "Most of our clients have already made their money and are

now looking for stability and a reliable income stream," Loesch says. "Municipal bonds are also tax-free, which is beneficial to individuals in high tax brackets."

While investing in the stock market could be volatile, the bond market does not experience as much volatility as other markets, which is attractive to The DRL Group's client base. A-rated bonds, the kind the group deals in, are mostly insured, increasing the odds that both interest and principal payments will continue without interruption.

SERVICE-SIDE BENEFITS

Another advantage The DRL Group's clients are privy to is dealer-level pricing.

"We do not charge any management fees since we are the 'desk' and interact directly with Wall Street. Our competitors, on the other hand, have to go through several layers of markups or charge management fees," Loesch explains. "And thanks to our proprietary, state-of-the-art technology, we have access to both primary and secondary bond markets on the bid side. As a result, in most cases, we can offer more municipal products—in all 50 states—at better prices, resulting in higher yields."

Just as important as the technology are the relationships Loesch and his colleagues form with clients. "When we get to know the person, their goals, and their experiences, we're in a better position to recommend products and strategies to meet their needs. We are always looking for the 'perfect match'—requested credit quality, yield, duration, or block size, for example—for each client. Once we establish an account, we maintain close communication with our clients and regularly monitor portfolio performance," he says. "Each client deserves individual attention along with the benefit of our expertise, and with The DRL Group, that's exactly what they'll get."

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