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The Moneybags© App

You've Read the Book

Now Get the App!

I developed the Moneybags© financial application to work hand-in-hand with my book, *The Stewardship of Wealth*. Why an app?

Because I recognize that the complex strategies discussed in the book can't be easily adapted for use by "smaller" investors. Suppose you are a middle-income investor, or perhaps a spouse or adult child in a wealthy family. Maybe you are an advisor to wealthy families but aren't wealthy yourself. Maybe you just want to learn about investing.

The point is that smaller investors need to observe best investment practices throughout the investment process just as much as wealthy investors do. Enter the Moneybags© app.

Once you download the app you walk through a series of screens that allow you to observe how a world-class (but smaller) portfolio is built, step-by-step. The app illustrates establishing a risk profile, designing a long-term (strategic) portfolio, adjusting the portfolio tactically, taking advantage of opportunistic investments, selecting managers, and monitoring and rebalancing the portfolio. Every step is explained, and if you want more information I refer you to the relevant chapter in *The Stewardship of Wealth*. From time to time I make changes in the portfolio, allowing you to observe how it evolves over time.

As a bonus, users of the app can order copies of *The Stewardship of Wealth* and receive access to my blogs, white papers, articles, and other investment writings.

The app is free to download. Simply look for it in the Apple AppStore or, if you use a different platform, log on to **www.MoneybagsApp.com.** Enjoy.