



# Adaptive Asset Allocation: Dynamic Global Portfolios to Profit in Good Times - and Bad

By Adam Butler, Michael Philbrick, Rodrigo Gordillo



**Adaptive Asset Allocation: Dynamic Global Portfolios to Profit in Good Times - and Bad** By Adam Butler, Michael Philbrick, Rodrigo Gordillo

**Build an agile, responsive portfolio with a new approach to global asset allocation**

*Adaptive Asset Allocation* is a no-nonsense how-to guide for dynamic portfolio management. Written by the team behind Gestaltu.com, this book walks you through a uniquely objective and unbiased investment philosophy and provides clear guidelines for execution. From foundational concepts and timing to forecasting and portfolio optimization, this book shares insightful perspective on portfolio adaptation that can improve any investment strategy. Accessible explanations of both classical and contemporary research support the methodologies presented, bolstered by the authors' own capstone case study showing the direct impact of this approach on the individual investor.

Financial advisors are competing in an increasingly commoditized environment, with the added burden of two substantial bear markets in the last 15 years. This book presents a framework that addresses the major challenges both advisors and investors face, emphasizing the importance of an agile, globally-diversified portfolio.

- Drill down to the most important concepts in wealth management
- Optimize portfolio performance with careful timing of savings and withdrawals
- Forecast returns 80% more accurately than assuming long-term averages
- Adopt an investment framework for stability, growth, and maximum income

An optimized portfolio must be structured in a way that allows quick response to changes in asset class risks and relationships, and the flexibility to continually adapt to market changes. To execute such an ambitious strategy, it is essential to have a strong grasp of foundational wealth management concepts, a reliable system of forecasting, and a clear understanding of the merits of individual investment methods. *Adaptive Asset Allocation* provides critical background information alongside a streamlined framework for improving portfolio performance.

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### Editorial Review

#### From the Inside Flap

If you're looking for cozy validation of traditional investment beliefs, go ahead and put this book back on the shelf. If instead, you're looking for a book that challenges widely held investment dogma with a mountain of evidence drawn from historical data and the most respected academic research, this book is for you.

The first hurdle most investors must overcome is their own cognitive wiring. As humans, we are built to thrive in a deterministic world, guided from day to day by our own experience and the signals we get from those around us. But modern markets turn our own instincts against us with randomness, extreme emotions, and the madness of crowds. Learn how to overcome these obstacles with confidence and discipline using a proven, first-of-its-kind systematic approach to investment management.

*Adaptive Asset Allocation* doesn't pull any punches; the authors lay out a compelling case for alternative investment methods with the ability to generate returns through even the toughest economic conditions. Essentially, *Adaptive Asset Allocation* aims to arm both advisors and individual investors with the most powerful tools to smoothly and confidently achieve their financial goals.

Part self-help book, part retirement planning tool, and part advanced investment course, *Adaptive Asset Allocation* merges practical techniques from many areas of psychology and finance into a practical guide for successful investing.

The authors let the evidence do the talking as they show you how to navigate your investments, and your emotions, across wide ranging market environments, using proven techniques rooted in the most contemporary academic research.

#### From the Back Cover

#### **MARKET CRASHES CAN RUIN EVERYTHING, IF YOU'RE NOT ADAPTIVE**

You think your portfolio is diversified, your investment returns will mirror what's been observed through history, and your retirement is secure.

It may not be.  
It probably won't.  
It probably isn't.

*Adaptive Asset Allocation* can help. Building on a strong philosophical and research-driven foundation, the book demonstrates how a potent combination of global diversification, risk management, and alternative sources of returns can deliver steady performance regardless of economic and market environment.

#### **Praise for ADAPTIVE ASSET ALLOCATION**

"The ReSolve crew at their best...Those enlightened advisors who understand the power of active asset allocation and risk management should read this book."

—**Mebane Faber**, Author of *The Ivy Portfolio* and *Global Asset Allocation*

"This book is relevant and recommended for investors who wish to learn more about harvesting factor premia."

—**Jason Hsu, PhD**, Co-Founder and Vice Chairman, Research Affiliates

"This book is dense with novel insights...earning it a prominent place on my own financial bookshelf."

—**Doug Short, PhD**, Advisor Perspectives

*"Adaptive Asset Allocation* merges empirical analysis and common sense to illustrate fundamental lessons in financial markets. The book has something for everyone: from retail investors to financial professionals.

Read it!"

—**Wesley R. Gray, PhD**, Alpha Architect

## About the Author

**ADAM BUTLER, CFA**, is CEO of ReSolve Asset Management, a firm that specializes in ETF managed portfolio solutions for global asset allocation. Adam has over twelve years of experience in investment management, and is primarily responsible for investment research and asset allocation. He is also the lead author for the GestaltU blog.

**MICHAEL PHILBRICK, CIM®**, is President of ReSolve Asset Management. He has over twenty years of experience in investment management, contributes to ReSolve's blogs and research, and is responsible for investment decisions, coaching, and strategic leadership.

**RODRIGO GORDILLO, CIM®**, is Managing Partner of ReSolve Asset Management. He has ten years of experience in investment management, contributes to ReSolve's blogs and research, and is responsible for investment decisions and business development.

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