

TrendWise

A Disciplined Approach to Investing

Experience. Process. Perspective.

Markets rise. Markets fall. Headlines change every day.

For many investors, the challenge is not access to information but deciding what to do with it. **TrendWise** was designed around a simple idea: investment decisions should be guided by a disciplined process rather than emotions, predictions, or reactions to daily market noise.

How TrendWise Works

TrendWise uses a rules-based mathematical model to evaluate market trends and determine portfolio positioning. When the model identifies favorable market conditions, the portfolio may be invested in broad-market stock indexes. When the model identifies unfavorable market conditions, the portfolio may move out of stock market exposure and into more defensive holdings.

Designed Around Simplicity

- Broad market exposure through index investments
- Rules-based decision making
- Generally low interest-rate sensitivity within fixed income allocations
- Consistent process across changing market environments

The Person Behind the Process

Robert A. “Rocky” Mills, MBA, has spent nearly five decades helping clients navigate changing markets and life transitions. His philosophy is simple: Create a process. Follow the process. Stay disciplined.

A Team Built on Experience

Rocky Mills – 48 years of industry experience

John Zezini, CFP® – 30 years of industry experience

Lin Anschultz, Client Services Manager – 50 years of industry experience

Together, the team provides long-term commitment to client service and investment planning.

What Clients Often Value Most

A defined investment process, straightforward communication, long-term relationships, and consistency during both favorable and challenging market environments.

Our Commitment

We believe successful investing begins with clarity, discipline, and guidance. Our goal is to help clients understand how their investment strategy works and how it fits within their broader financial plan.

Learn More

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