

# Singer Wealth



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## 3X the Stock Market

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Most Investors and money managers measure their results against the S&P 500 index. That index consists of this country's 500 largest publicly traded companies and is generally viewed as a barometer of how the stock market is doing. If you are investing in stocks, mutual funds or ETF's other than the S&P 500 index, you are probably trying to obtain returns that are better than the index. However, most retail investors as well as most professionally managed mutual funds underperform the S&P 500 Index.

Therefore, if you are trying to beat the market by stock selection or by manager selection, the odds of beating the market are small. If you are a money manager that can beat the market by 1%, I would consider you a rock star.

Our company, Singer Wealth Advisors LLC, just launched a structured note with JP Morgan Bank that is contractually guaranteed to triple the returns of the S&P 500 Excess Returns Future Index (SPXFP). This index is highly correlated to the S&P 500 index. For the five-year period ending in September of 2024, according to Citibank, the S&P 500 index averaged 13.94% vs 12.71% for the SPXFP.

If you invested \$100,000 in S&P 500 index 5 years ago, you would have made about \$92,000 in profit. With this note, a \$100,000 investment would have resulted in about \$243,000 in contractually guaranteed profit.

Unlike investing in the actual S&P Index, this note matures in ten years. If you have not sold it earlier, you must realize the gains after 10 years. Additionally, the note is subject to the credit worthiness of the issuing bank. If you are a long-term stock investor, this type of note provides an opportunity to outperform the market and is available to majority of investors.

Have you heard about our Vision Quest Process? Watch the video below to learn more!

# Singer Wealth

[www.singerwealth.com](http://www.singerwealth.com)  
561.998.9985



Sincerely,  
Keith Singer

*Singer Wealth*  
1515 S Federal Highway Suite 302  
Boca Raton, FL 33432  
(561) 998-9985  
[www.singerwealth.com](http://www.singerwealth.com)

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Singer Wealth | 1515 S Federal Hwy Suite 302 | Boca Raton, FL 33432 US

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