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The Bob Report
Summer 2018

Dear Folks,

Guess what, just when you thought Jazz was getting boring we have moved. We are now at #1400 (the 14th floor) of 191 Lombard Avenue. Birk's Jewelers occupies the main floor. The building is across the street from the Richardson building at Lombard and Main. FYI: I have signed a five year lease so we are not moving again anytime soon. Parking lots abound within a block or so and the Fairmont Hotel is quite accessible. Come visit! We are going to formally have our first client open house in September. As you now know it, nothing else changes. Caitlin, April, Sandy and the Investia Elephant all have space in the new office.

Stuff you need to know: I was just in New Orleans to attend one of my "meet the smart guys" meetings. I met with Greg Dean who manages Cambridge Growth Companies fund. He and his buddies all in their mid-30's spent an inordinate amount of time and money in the pursuit of excellence in money management. They hired an independent third party to audit their investment returns for the last 7 years. They wanted to know what they did right and what they could improve. The results: 85 % of the rate of return they achieved came from STOCK SELECTION. This means you have to buy the right company at the right price and know when to sell it. Simple not easy, as I have always "yammered". Finding excellent people who are obsessed with the pursuit of superior returns and DO NOT Lose the money is all that really matters. We continue to pursue these fine folks.

Over the summer I am going to enjoy life on the west coast. Bob Events resume in September. Jazz Vespers Victoria is fully booked for the Fall Season. McNallys starts again September 8th. Watch for the Lombard Street office Open House in September.

Please let us know if you prefer to receive Bob Reports by email. Thank you for your continued confidence in Jazz and our team.

Cheers,

A handwritten signature in black ink, appearing to be "Bob", written over a light grey background.

Bob

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