

Investing in Companies with Business Advantages

Weik Investment Services, Inc.

For more than 25 years, Weik Investment, an independent Registered Investment Adviser, has been managing portfolios for individuals and institutions.

“Clients work directly with the individuals that manage their investments,” says Tom Weik, President and Chief Investment Officer. “Our investment team manages both equity and balanced portfolios that are customized in accordance with each client’s objectives.”



Standing, from left: Joseph C. Scalise, Sarah C. Skillman and Warren W. Weik. Seated: Robert C. Kline, Thomas W. Weik and Abhishek Amatya.

reward characteristics of each individual investment,” Weik comments. “While diversification is clearly important, too many times securities or ‘baskets’ of securities are added to a portfolio without understanding associated risks. This can result in what has become referred to as ‘diworsification.’ Ben Franklin said, ‘An investment in knowledge pays the best interest.’”

Weik is a leading tournament bridge player in Pennsylvania and President of District 4 of the American

Contract Bridge League, a multi-state area. He has observed similarities between investing and playing a bridge hand: “Both involve looking forward and assessing the probabilities of success and failure for alternative actions.”

“Our stock selection process emphasizes companies with moats — competitive advantages that are sustainable. We believe that earning the compound returns of a good business over time is an optimal way of accumulating capital.”

— Tom Weik, President and Chief Investment Officer

Weik Investment offers clients a readily understandable investment process designed to meet their objectives. The company is experienced in managing retirement plans, foundations, trusts, and individual portfolios with a variety of objectives.

CUSTOMIZED PORTFOLIO MANAGEMENT SECURITY ANALYSIS RISK MANAGEMENT

This firm’s equity research is focused on understanding companies and their business advantages. These businesses typically earn high returns on their invested capital and boast strong balance sheets.

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Buying at a Discount

Weik Investment examines risk as well as return. Prices paid to acquire securi-

ties for clients are carefully examined, and this process is considered a key element in risk management. The team believes that Benjamin Graham’s concept of “margin of safety” is one of the all-time great contributions to the practice of security analysis. The concept is to create a degree of safety by purchasing stocks at prices offering a discount to underlying business value.

“We believe too many investors attempt to achieve safety through extremely broad diversification, while they should be more focused on the risk/



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