



## 2023 KICKOFF: MANAGING RISK IN TODAY'S MARKET ENVIRONMENT

*with Paul Ma, CFA, Vice President, Lead Portfolio Strategist, Fidelity Investments*

As we begin 2023, it seems that there is risk hiding in every corner of the market; such that it may feel paralyzing to invest in the current market environment. Join us as we welcome Fidelity's Paul Ma, who will help guide us in how to ignore the media noise — and instead focus on potential risks as well as investment fundamentals to help in navigating this market and staying the course in working toward your overall wealth goals.

**WHEN:** Wednesday, January 18th at Noon PT

**JOIN ZOOM:** – Select “Join a Meeting” (or use RSVP link provided)  
– Enter Meeting ID: 815 9254 8075 / Passcode: 761011

**Audio Only:** – Dial: 1-669-900-6833  
– Enter Meeting ID: 815 9254 8075 / Passcode: 761011

**EVENT Q&A:** To submit a question for our presenters in advance or during the webinar, please email it to [marissa@jsffinancial.com](mailto:marissa@jsffinancial.com).



**RSVP:** [Click here to RSVP](#)

**QUESTIONS?** Contact Marissa Brasko at 323.866.0833 or [marissa@jsffinancial.com](mailto:marissa@jsffinancial.com)

### ABOUT PAUL MA

Paul Ma is vice president and lead portfolio strategist on the Portfolio Construction Guidance (PCG) team at Fidelity Institutional®. In this role, Mr. Ma assists the nation's leading investment professionals to resolve their broadest portfolio concerns. As part of the PCG team, he partners with Fidelity's sales and relationship management teams to arm investment professionals with the tools, know-how, and confidence they need to build robust model portfolios and explain them to their clients.

Prior to joining Fidelity in 2015, Mr. Ma managed equity portfolios at a variety of firms, including U.S. equities at SunAmerica, international and global equities at McLean & Partners and BlackRock, and long/short equities at Quad Capital. Previously, he served as a member of the Strategic Relationships team at Putnam Investments. As a co-founder of LifeHarbor, Mr. Ma also used his asset allocation and portfolio construction experience to work in software form.

Mr. Ma earned his bachelor of arts degree in chemistry from Harvard University and his master of technology and policy degree from the Massachusetts Institute of Technology (MIT). He is also a CFA® charterholder and holds the Financial Industry Regulatory Authority (FINRA) Series 7, 24, and 63 licenses. Additionally, Mr. Ma is a frequent speaker on investment topics at client venues as well as at Fidelity's popular Portfolio Construction Institute events.

---

Information presented in this seminar was prepared by Fidelity Investments. Fidelity Investments is not an affiliate of JSF Financial, LLC, a Registered Investment Advisor.

The opinions expressed in this seminar are not necessarily those held by JSF Financial, LLC. The information, analysis, and opinions expressed are for educational information only and are not intended to provide specific advice or recommendations for any individual or entity and should not be construed as a recommendation or solicitation to buy or sell any products. Investment in securities involves risk and may result in the loss of principal invested.

For a fund prospectus, contact Fidelity Investments at 1 (800) 343-3548 or visit <https://www.fidelity.com>. Investors should carefully consider the investment objectives and risks as well as charges and expenses of the mutual fund before investing. The prospectus contains this and other information about the mutual fund. Read the prospectus carefully before investing.

Paul Ma is speaking on behalf of Fidelity Investments. Opinions and comments may not reflect those of Fidelity Investments or its affiliates. Opinions and estimates offered constitute our judgement and are subject to change without notice, as are statements of financial market trends, which are based on current market conditions. The views and strategies described may not be suitable for all investors. Any forecasts contained herein are for illustrative purposes only and are not to be relied upon as advice or interpreted as a recommendation.