



DBFitzpatrick
REGISTERED INVESTMENT ADVISORS

NEWS RELEASE

September 21, 2011 / For Immediate Release

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GLOBAL STRATEGIC ANALYSIS DRIVES ASSET MANAGEMENT FIRM OVER \$1 BILLION

Northwest Boutique Advisor D.B. Fitzpatrick Outperforms Benchmarks Through Recession

BOISE, Idaho – Disciplined investment strategies driven by analysis of global financial markets has moved a Pacific Northwest asset management firm, D.B. Fitzpatrick (www.dbfitzpatrick.com), past the \$1 billion threshold in assets under management.

“Diversifying assets internationally is a proven way to manage risk, and our approach allows us to do that according to each client’s risk and return requirements,” said Dennis Fitzpatrick, a Ph.D. who left a career in higher education to establish the boutique firm in the quality-of-life center of Boise, Idaho in 1984. “Our clients remain at the center of our analytical work.”

The catalyst of D.B. Fitzpatrick’s growth into an organization representing Fortune 500 companies in several states, retirement funds, major health care and energy institutions and many high-net-worth individual investors has been exceptional analysis of information worldwide. The company’s linguistic skills and experience abroad add valued insights.

“We count on D.B. Fitzpatrick to understand us deeply, to rigorously track market opportunities, and to help optimize performance based on those principles we believe in,” said Bill Glynn, president of Intermountain Industries and Petroglyph Energy who previously served as CEO of Intermountain Gas Company.

“Our job is to maximize the return of every client’s portfolio within the boundaries they deem appropriate,” said Cody Barney, who manages the firm’s fixed equity portfolio. “To make this a reality, communication and the understanding of individual needs are crucial.”

DB Fitzpatrick’s investment process includes:

- A broad, top-down analysis of the global economy. The analysis allows the company to optimally design client portfolios to match their long-term investment requirements.
- Select growth stocks that are generating high quality earnings and strong, reliable cash flows from each sector selected.
- DBF-recommended investment in exchange-traded funds allows clients to achieve broad diversification in a variety of sectors around the world.
- Recommend appropriate allocation of fixed income securities to meet the volatility-management needs of the client.

D.B. Fitzpatrick has been working with high-net-worth individuals, families, and institutional investors for more than 20 years.

“When D.B. Fitzpatrick & Co. (www.dbfitzpatrick.com, http://twitter.com/DB_Fitzpatrick) made a point of letting us know that our state's retirement system makes a market in lending to selected real estate projects, it felt like a validation of the everyday discipline of our company because those standards are high,” said Idaho-based real estate investor Ron Van Auker. “Over our more than a decade with D.B. Fitzpatrick & Co., we have broadened and deepened our relationship with them to include investments that depend on the managers' excellent analysis of portfolio risks and their recommendations for continuous refinement. The proof of the performance has come consistently in DBF's exceptionally transparent quarterly reports to investors. We have increased our investments with DBF and we believe the quality of this partnership has earned our company's lasting commitment.”