



## Differentiating strategies to achieve your **unique** investment objectives.

### TRUE FIDUCIARY® ADVICE

Embrace the legal fiduciary obligation to place your interests first and target total financial well-being:

- 100% independent firm
- Fee-only financial advisor with complete Transparency® on fees paid
- Transparent portfolio that is viewable 24/7

### CUSTOMIZED INVESTMENT POLICY STATEMENTS

Custom, purpose-driven, tax-efficient portfolios:

- Lifetime Capital Needs®, Wealth Surplus®, and Aspirational Wealth™

Highly-customized and clearly defined portfolio parameters:

- Risk assessment
- Asset allocation modeling
- Cash flow, tax, and liquidity strategies

### INDIVIDUALIZED PORTFOLIO IMPLEMENTATION AND MONITORING

Dedicated in-house professionals focused on your goals:

- Advisor, Portfolio Manager, Trader, and Private Wealth Services
- In-person or virtual portfolio reviews

Customized approach to manage your portfolios:

- Diversification strategies using customized investment models
- Tax-efficient asset allocations
- Manager search, due diligence, fee negotiation and advocacy
- Trading execution through multiple exchanges, vehicles and financial institutions
- Ongoing portfolio rebalancing at no additional cost
- Liaison to 3rd party custodians
- Custom tax-loss harvesting, offsetting taxes on gains and income

### INNOVATIVE INVESTMENTS

Access to:

- Traditional and digital assets
- Venture capital and alternative private investments
- Bridge loans and mezzanine debt
- Customized structured notes
- Separately managed accounts

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