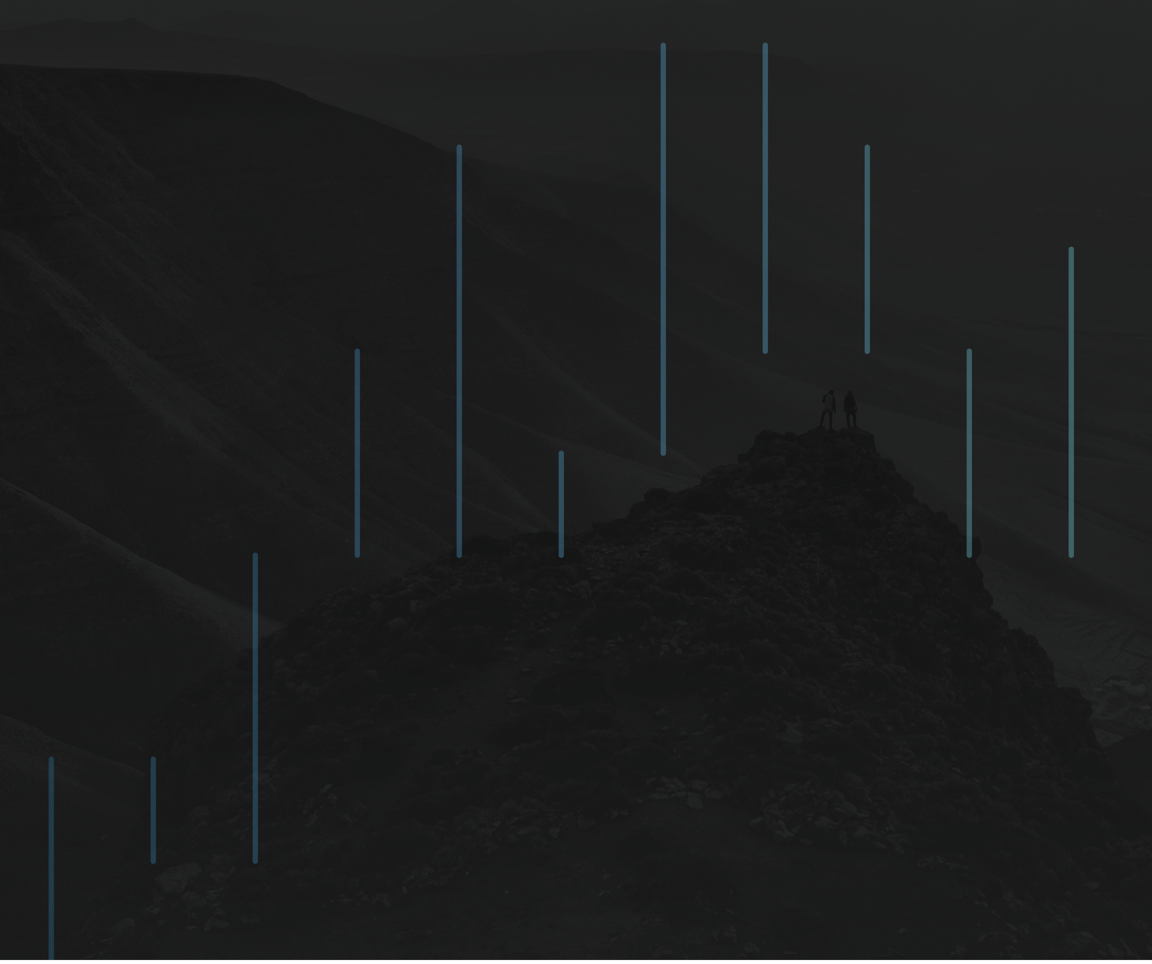
Experience
is everything



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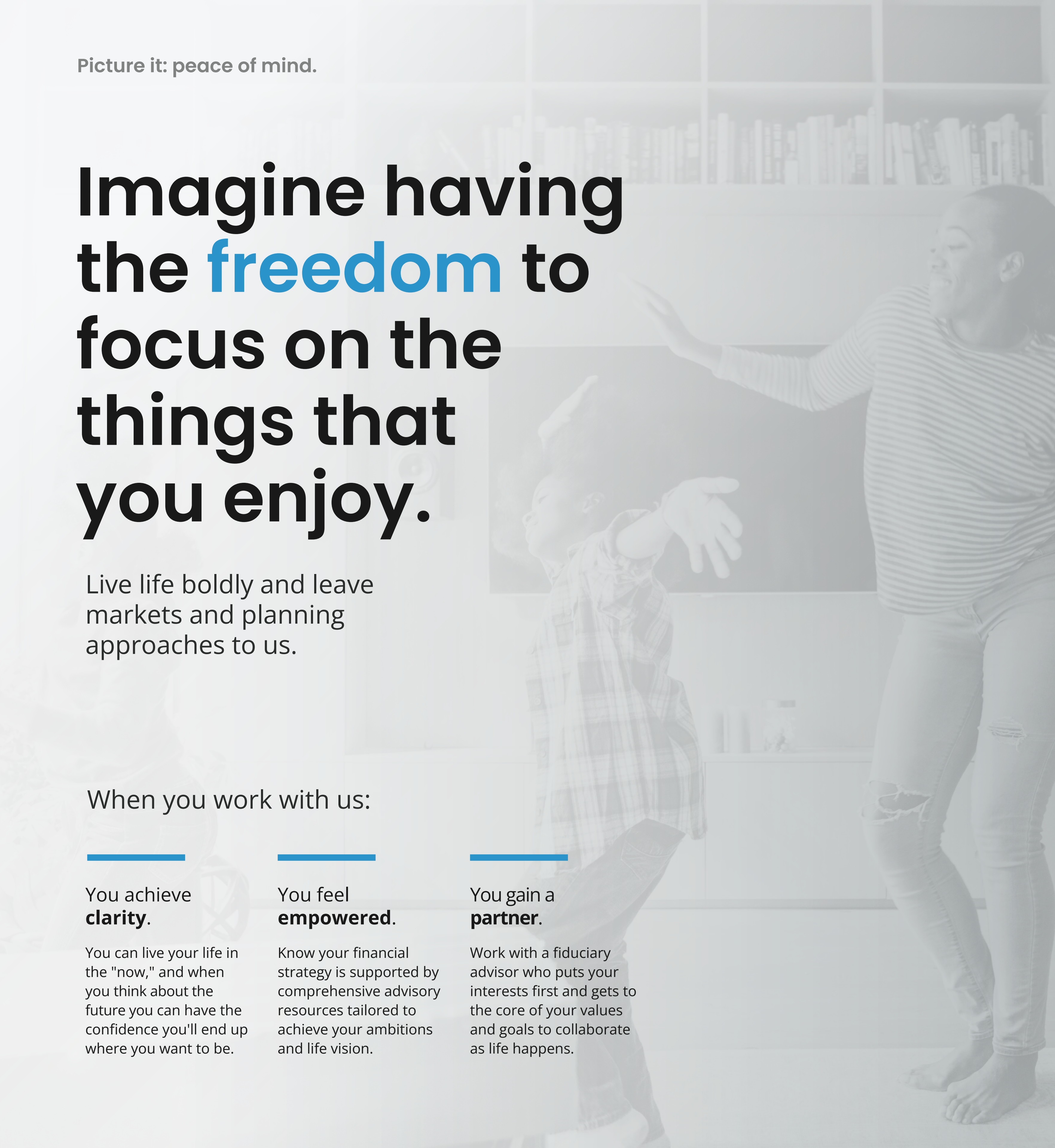


Picture it: peace of mind.

Imagine having the freedom to focus on the things that you enjoy.

Live life boldly and leave markets and planning approaches to us.

When you work with us:

You achieve **clarity**.

You can live your life in the "now," and when you think about the future you can have the confidence you'll end up where you want to be.

You feel **empowered**.

Know your financial strategy is supported by comprehensive advisory resources tailored to achieve your ambitions and life vision.

You gain a **partner**.

Work with a fiduciary advisor who puts your interests first and gets to the core of your values and goals to collaborate as life happens.

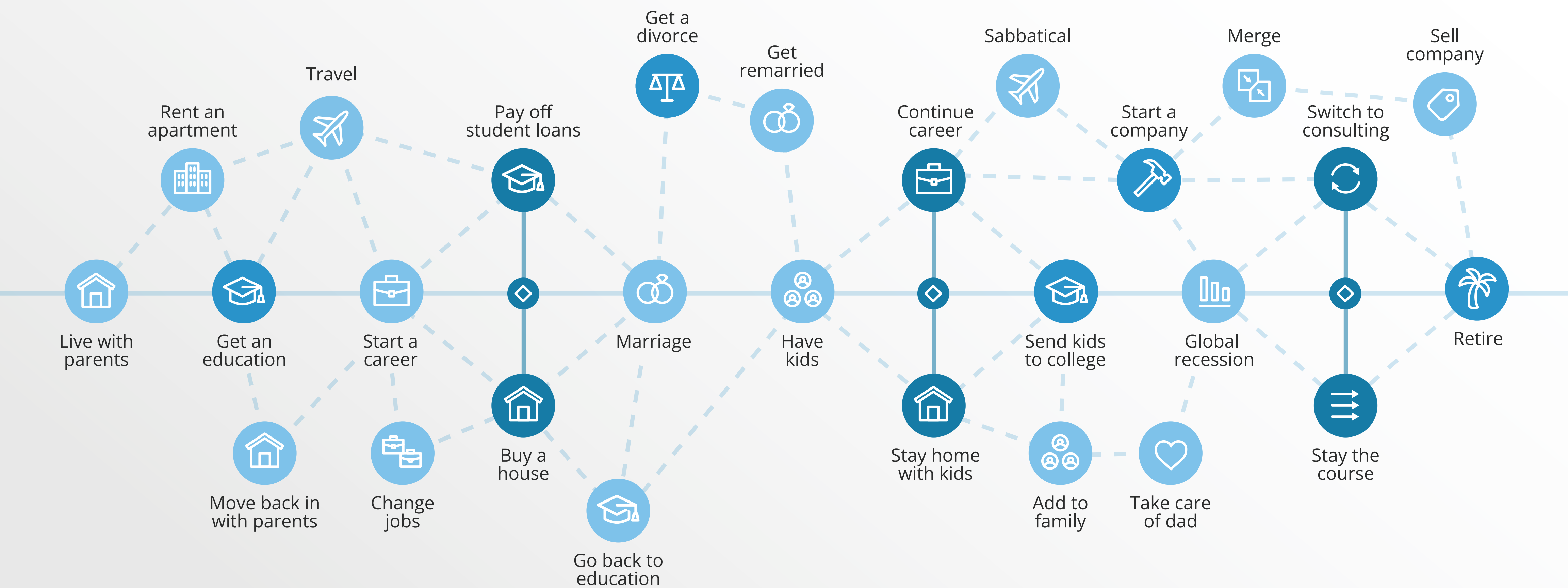
If you believe a sound plan can be the foundation for achieving great things, you're in the right place. Trust your financial future to a community of advisors, financial specialists, and peers who believe in living well.

Your best interests are at the center of our planning approach. You, your family, your goals, and your most important dreams all play an important role in crafting a plan that embraces and improves the most important aspects of your life.

Life isn't linear.

A clear path on life's winding road.

Navigating your finances through each phase of life requires more than just a plan. **It requires a partner.** Through life's ups and downs, your advisor will be there to add insight, offer reassurance, and amend your plan so you may reach your ideal future.



For illustrative purposes only.

Discover the strategy designed for your

When life changes, your plan evolves.

Life is layered with significant events that can influence your future. When things change, you need a trusted advisor who understands the short- and long-term financial impact so you can focus on living life to the fullest.

Our Process

Embark on a personal discovery process alongside your advisor to identify elements of your life that will shape the design of your financial strategy.

Backed by a comprehensive range of resources, your advisor will build a plan that's right for you, with distinct objectives and attainable action items.

Regular check-ins will help protect your plan and allow you to measure progress toward your goals and adjust as needed.

Your experience is everything.

Your strategy begins with you.

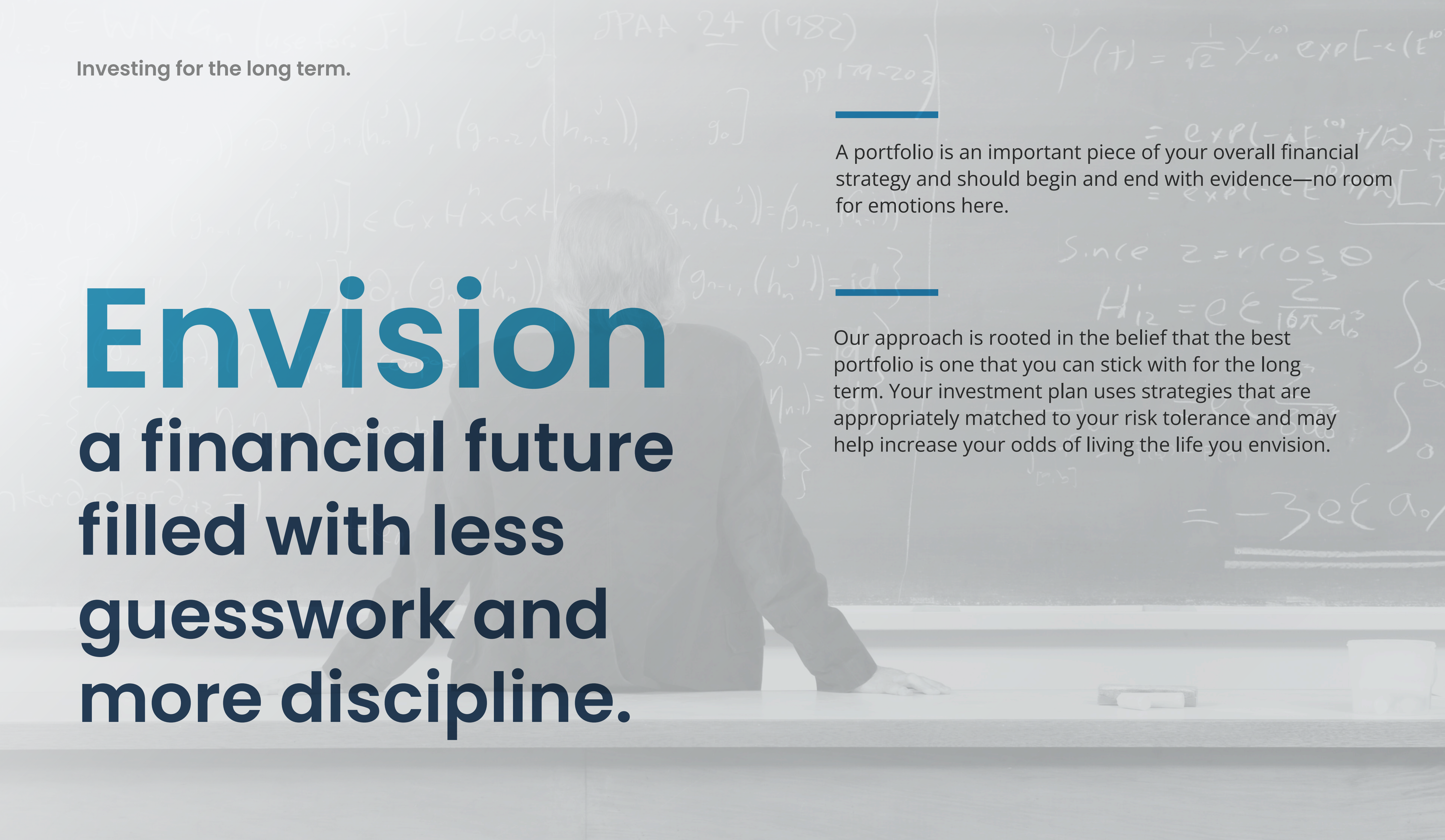
What do you really want? To support your favorite causes? To send your children or grandchildren to college? To feel confident you have enough?

Your life—your dreams, desires, and the impact you want to make on this world—are the starting point for our planning approach.

The Elements of a Wealth Strategy

Money, goals, life, and impact — your financial strategy is more than just investment decisions. Your dreams and passions are too important to leave to chance. A sound financial plan encompasses every aspect of your life and is built to last.

Investing for the long term.



Envision a financial future filled with less guesswork and more discipline.

A portfolio is an important piece of your overall financial strategy and should begin and end with evidence—no room for emotions here.

Our approach is rooted in the belief that the best portfolio is one that you can stick with for the long term. Your investment plan uses strategies that are appropriately matched to your risk tolerance and may help increase your odds of living the life you envision.

Discover the path to security and freedom.

Let data bring you peace of mind. Work with your advisor to control what you can: taxes, fees, and risk. Your portfolio can contain diversified stock funds; high-quality bonds; and, in some cases, alternative investment strategies.

You deserve the brightest minds on your side. An investment strategy driven by research gives you the best chance at reaching your goals. The strength of your plan comes from advanced strategies rooted in collaboration plus a committee-based approach to investment policy.

One of the earliest and most important academic studies that informs our investment philosophy is Nobel Prize-winning economist Harry Markowitz's groundbreaking research on portfolio selection, first published in March 1952. "Portfolio Selection," Harry Markowitz. The Journal of Finance, Vol. 7, No. 1. (Mar., 1952), pp. 77-91.

Across the nation and in your neighborhood.

The power of partnership.

When you work with us, you're supported by a diverse team of resources and specialists. As we sit with you to develop your personal financial strategy, our strategic partnerships help ensure you get a well-conceived plan designed to meet your long-term goals.

Investment Strategy and Analysis. We aim to capture the returns of global stock and bond markets to help our clients reach their long-term goals while controlling risks, costs, and minimizing taxes.

Trading and Operational Support. We spend more time with our clients and deliver more timely and accurate investment management because of our back-office support partnership.

Advanced Financial Planning. Our clients benefit from the perspectives and guidance of experienced financial planning minds.

Who's on your team?

Your Advisory Team
Whenever you need advice or insight, we will be there. No question or concern is too small.

National Custodians and Thought Leaders
A deep bench of specialists support us with the latest investment and planning insights.

Other Professionals
A truly holistic approach to your financial future may involve close collaboration between your advisor and attorneys, CPAs, and other service providers.

Ready to Start Your Wealth

Experience?

Experience a sense of calm

and confidence when you collaborate with your advisor to create a plan that's right for you.

Experience a rational way to invest and plan

with a financial plan guided by discipline to meet your needs.

Experience the best of both worlds

through a personal relationship with an advisor backed by national thought leadership resources and intellectual insight.

What You Pay

From the start, you will receive clear and transparent pricing information aligned with your unique financial situation. Your pricing will be based on various factors such as the amount of assets managed.

By working with fiduciaries who always work in your best interest, this model ensures your advisor is always on your side.