

Trustworthy:

- Assets custodied at National Financial Services LLC (NFS), a Fidelity Investments company
- Solid long track record (established in 1976)

Personalized Service:

- Focus on serving individual high net worth investors
- Access to key personnel including portfolio managers
- Team-based approach to client service

Proven Investment Methodology:

- Specialists in equity and fixed income management
- Each account is separately managed, segregated and customized

Unlike many firms that adhere to a strict “remain fully invested at all times” philosophy, during periods of significant equity market stress, we will increase our client’s cash allocations to temper volatility and preserve capital.