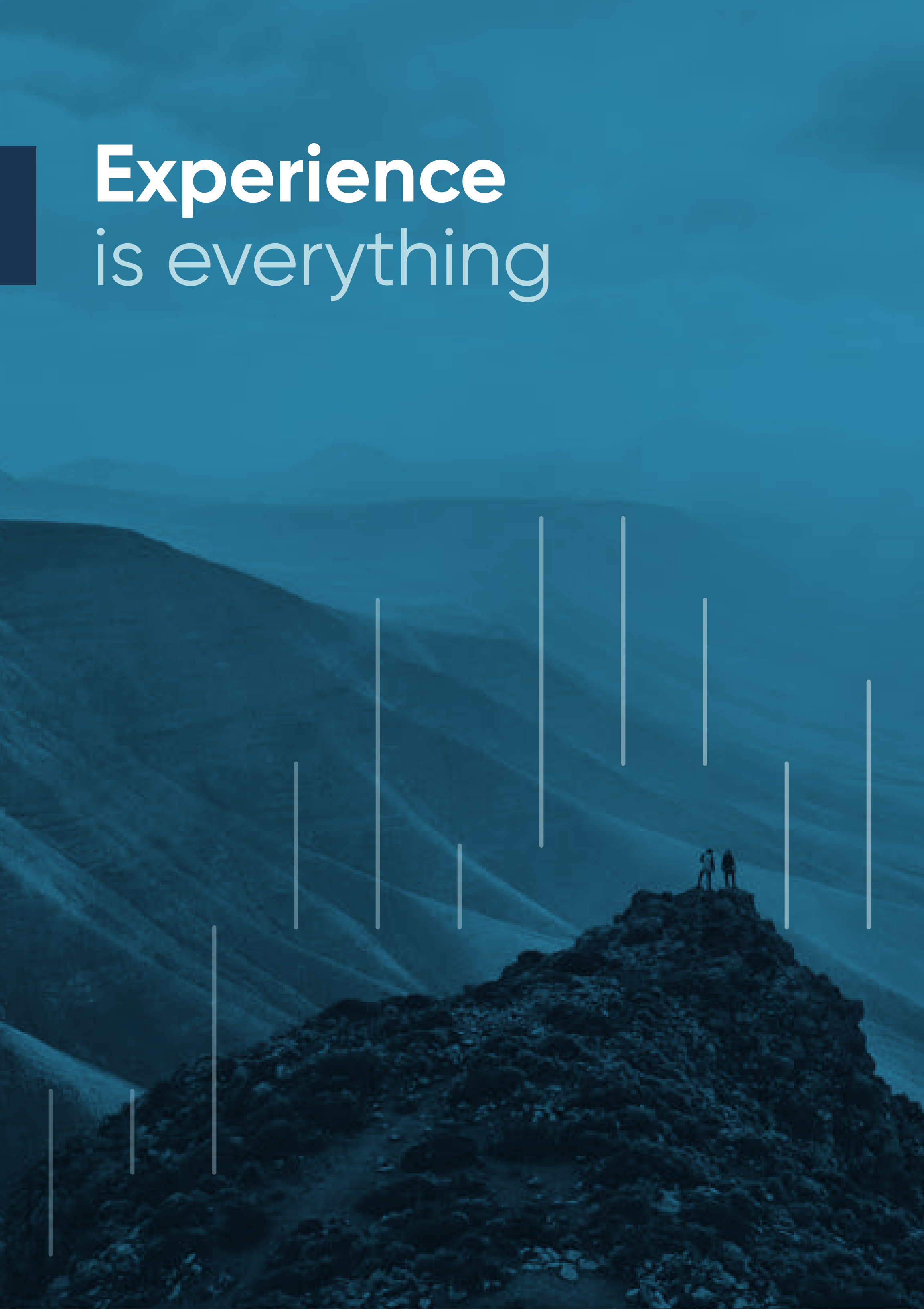
Experience
is everything



capstone
WEALTH PARTNERS

Picture it: peace of mind.

Imagine having the freedom to focus on the things that give you energy.

Live life boldly and leave markets, planning approaches and tax strategies to us.

When you work with us:

You achieve **clarity**.

Live your life now, and when you think about the future, be confident you'll end up exactly where you want to be.

You feel **empowered**.

Know your financial strategy incorporates layers of hard evidence and is designed around your true needs and wants.

You gain a **partner**.

Get comfortable sharing your values and goals with a fiduciary advisor who puts you at the center of your strategy.

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.

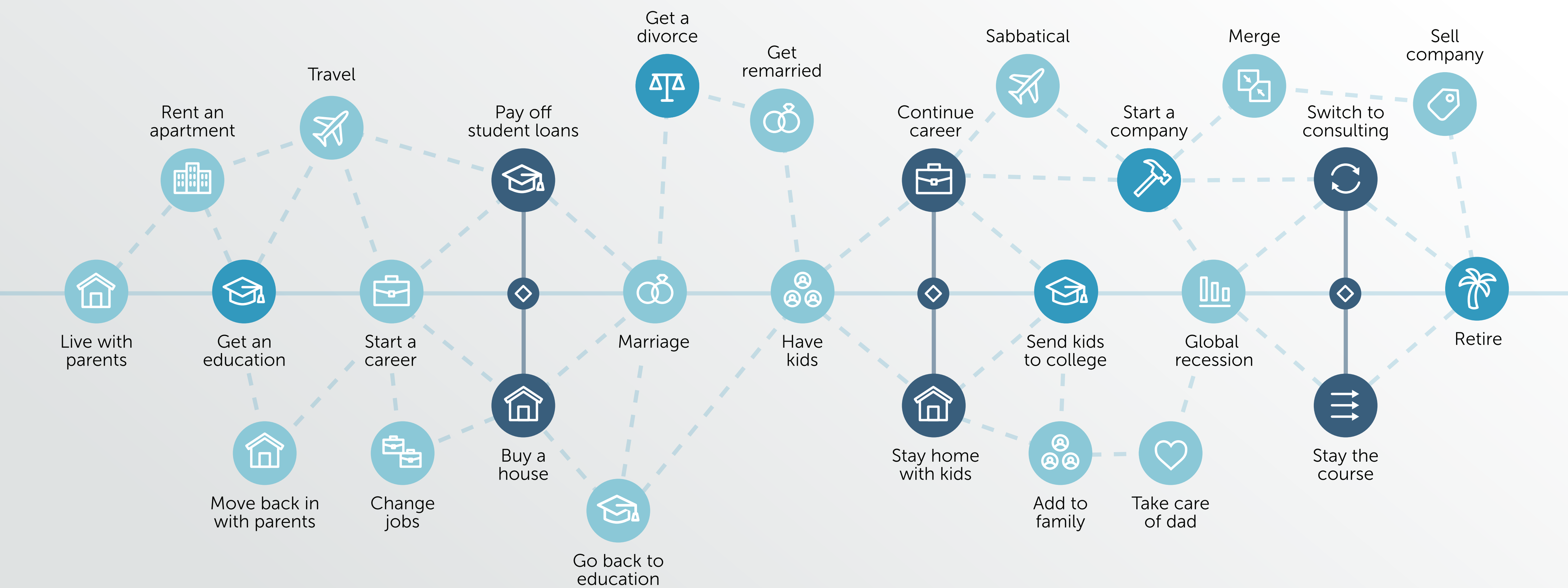
Your best interests are at the center of our evidence-driven approach. You, your family, your goals and your most important dreams all play an important role in crafting a plan that embraces and improves the most important aspects of your life.

When you choose to work with us, your plan is backed by financial planning insights and decades of peer-reviewed financial research showing the right way to invest.

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.



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.

Design | Build | Protect®

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

Then your advisor will **build** a custom plan with clear objectives and attainable action items, using academic research and financial science to increase your odds of success.

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 evidence-driven planning approach.

The Elements of a Financial 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.

Make decisions backed by evidence, not guesswork.

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

See what it's like to have decades of objective, peer-reviewed market research working for you. Your investment plan uses cost-effective and tax-efficient 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 will 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 rigorous, peer-reviewed research gives you the best chance at reaching your goals. The strength of your plan comes from advanced strategies rooted in academia plus a committee-based approach to investment policy.

The support team behind the scenes.

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 industry leading financial planning minds.

A team on your side.

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 Holistic 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 smarter way to invest and plan

with a financial strategy infused with decades of evidence-driven research.

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 fee-based fiduciaries who always work in your best interest, you will never pay your advisor a commission for selling products. This model ensures your advisor is always on your side.