



The Investing World Is Complicated

Your Portfolio Doesn't Have to Be

Are you tired of the sheer complexity of your investment portfolio? Inconsistent results? Hidden fees? If so, we'd like to recommend a solution we think could work for you.

The Credential Managed Account represents a new standard in distinctive wealth management – delivering long-term results in a portfolio that's completely managed for you, by the experts. You can take a hands-off approach knowing your Credential Managed Account benefits from:

- Expert advice from a team of professionals that handles all the details from buy and sell decisions, to tax strategies, and performance monitoring.
- World class, pension-grade Investment Managers who oversee the securities within your portfolio, with a focus on growing and protecting your wealth.
- Individualized portfolios that reflect your unique financial goals, investment preferences, and risk comfort level.
- Optimal long-term return potential through ongoing performance and style monitoring, and regular portfolio reviews.
- Transparent fees that are all-inclusive, potentially tax deductible, and tied to account value, not trading activity.
- Comprehensive reporting that provides crystal clear fees, rates of return, and holdings.

In previous years, this type of account, expertise, and level of personal attention was reserved for institutional clients. But now, it's available to you. With an initial investment minimum starting at just \$150,000, you can access the world's best money managers to help you invest, prosper, and triumph.

We believe the Credential Managed Account is an excellent choice for your wealth management needs. Since we've only touched on a few points here, we'll follow up with a phone call. Meanwhile, call us if you have questions or want to arrange an appointment.

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