

LaMarca/Shevitz Team

# Governing Principles

- We will treat our clients' investments with the same care and attention we treat our own.
- We will remain significant investors in the same investment strategies we recommend to our clients.
- We will adhere to a strict investment philosophy. We will not be swayed by emotions, fads or a herd mentality.
- We will avoid conflicts of interest. We will not accept compensation from outside sources, and we will not invest in proprietary products.
- We will continuously enhance our efforts to provide high-quality service to our clients.
- We will communicate with our clients candidly. We will emphasize not only our successes, but also openly discuss our mistakes. Our guide is to tell you the facts that we would want to know if our positions were reversed.
- We will educate our clients about our investment approach and the financial markets.
- We will provide our clients with realistic expectations for investment returns.
- We will be honest with our clients in our assessment of their ability to achieve their financial goals.
- We will manage our own finances in a conservative manner to avoid having any outside financial pressures cloud or influence our advice to clients.
- We will measure our success by our ability to help our clients achieve their financial goals.

## Personal Investment Advice

We act as stewards for our clients' wealth by building personalized investment plans designed to help our clients accomplish their financial goals.

We focus on wealth creation, wealth preservation and wealth distribution.

## Wealth Creation

We strive to grow our clients' wealth for long-term needs through:

- implementing a disciplined investment approach
- designing a consistent savings program

## Wealth Preservation

It is our mission to mitigate significant permanent losses by:

- providing thoughtful investment advice based on sound research
- matching portfolio risk to client temperament
- considering the impact of inflation on an investment strategy
- advising on appropriate management of debt
- working with insurance advisors to protect against catastrophic events
- partnering with tax advisors to minimize taxes

## Wealth Distribution

We balance current needs with estate distribution desires by:

- establishing a reasonable spending policy and portfolio structure to meet current cash flow needs
- working with estate planning attorneys to establish and implement a plan that efficiently passes on wealth to future generations

An experienced, dedicated team committed to meeting your financial goals:

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