

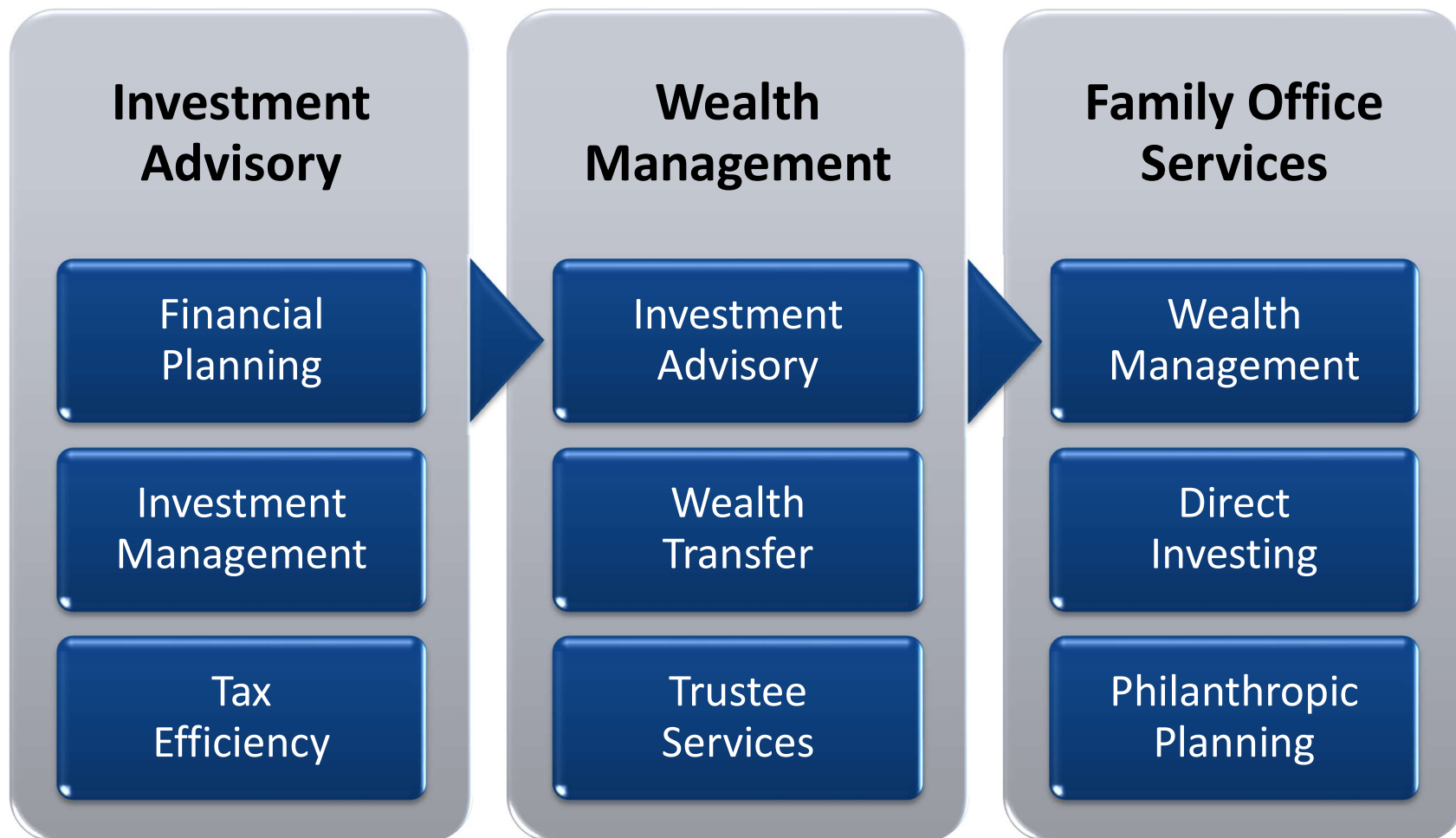
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SERVANT  
CAPITAL  
ADVISORS

**Introduction**

# What We Do

- Provide investment advisory and wealth management services to high net worth individuals and families
- Three levels of service tailored to meet clients' needs



# How We Are Different

## ① Transparency

- No commissions
- No selling products
- Alignment of interest
- Knowledge → Confidence → Discipline
- Trusted Advisor

## ③ Professional Investors

- Long-term horizon
- Value investing
- Custom portfolio
- Diversification

## ② Minimize Fees & Taxes

- Low, flat fee
- Focus on after-tax returns
- Qualified retirement plans, 529 Plans
- Backdoor Roth IRA
- VA & Variable Universal Life Insurance

## ④ Give Back & Serve Others

- 10% of profits to charity
- After financial goals achieved
- Clients control the donations
- “As for me and my family, we will serve the Lord” – Joshua 24:15

- Stocks > Bonds
- Risk Tolerance
- Discipline



- Eliminate cognitive biases
- Dimensions of Expected Return: Equity, Small, Value, Profitability
- Diversification

- Margin of Safety
- When Price ↓, Expected Return ↑
- Risk ≠ Volatility
- Patient Contrarian

# What Are Your Goals?

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- Retirement income
- Investments
- Family business
- Education
- Inheritance
- Governance
- Philanthropy
- Legacy

# Financial Planning Topics

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- Let's start with what is most important to you



Retirement  
Planning

Investment  
Portfolio

Tax  
Strategies

Wealth  
Planning

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