SERVANT
CAPITAL
ADVISORS

Introduction

What We Do

SERVANT CAPITAL

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

Investment Advisory	Wealth Management	Family Office Services
Financial Planning	Investment Advisory	Wealth Management
Investment Management	Wealth Transfer	Direct Investing
Tax Efficiency	Trustee Services	Philanthropic Planning

How We Are Different

SERVANT CAPITAL

1 Transparency

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

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

3 Professional Investors

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

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

Investment Philosophy

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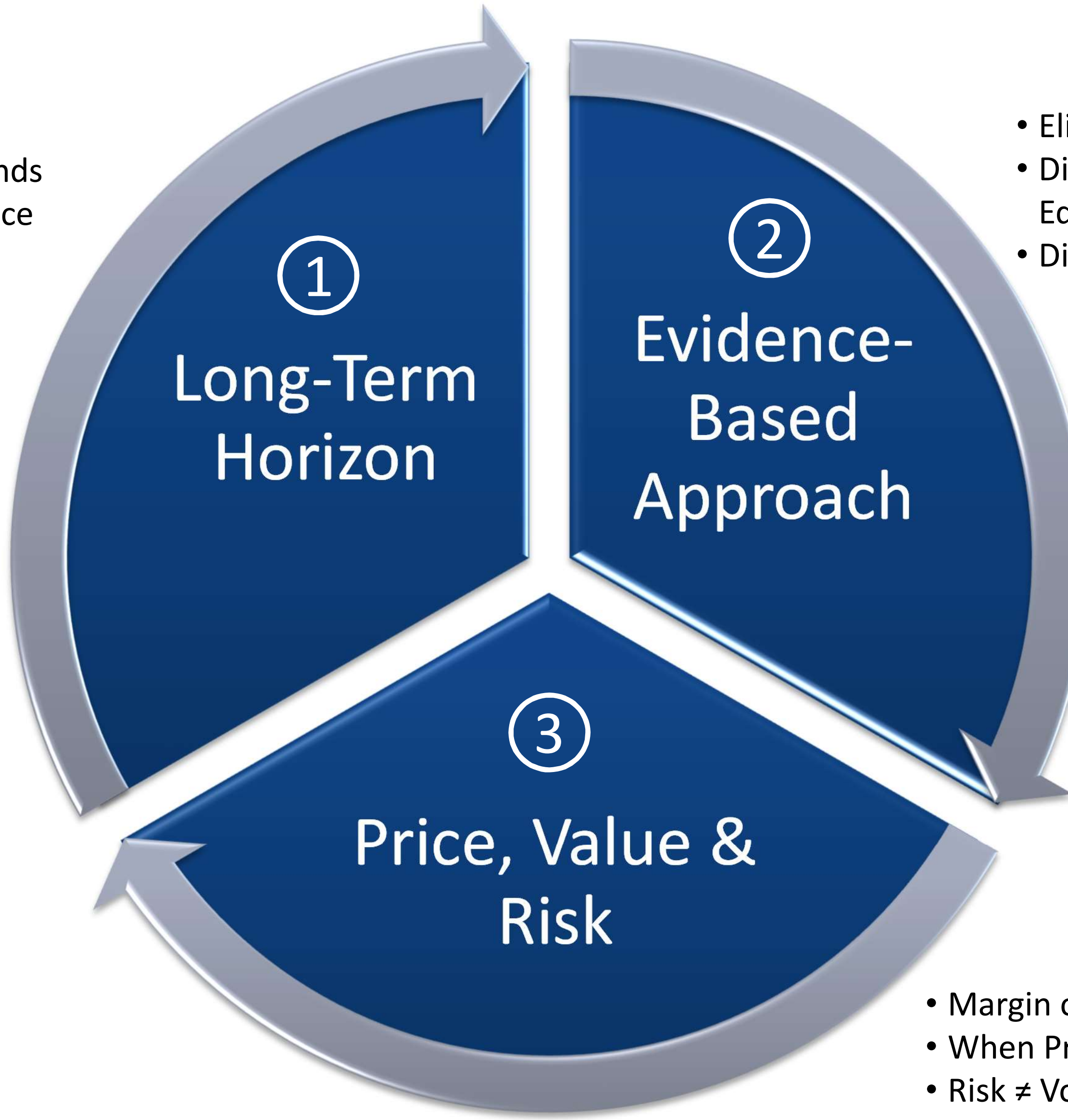
- Stocks > Bonds
- Risk Tolerance
- Discipline



- 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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