

Second-Opinion Service



- Exclusively for friends, family and associates of our valued clients
- In this challenging economy, you probably know a friend, family member or colleague who may be in a complex situation or just unhappy with the advice from his or her financial advisor – it’s not uncommon. Studies have shown that more than 80% of high-net-worth investors would value a second opinion on their finances.
- In order to help the people you care about achieve their financial goals, we have created a complimentary Second-Opinion service. We’re pleased to offer your friends, family members and associates the same expertise and guidance that you have come to expect as a valued client of Ellis Capital Management.
- As a client of Ellis Capital Management, you benefit from a cutting-edge team that has a clear and comprehensive vision of wealth management.

Wealth management

Investment Consulting

- Asset allocation
- Portfolio management
- Manager due diligence
- Risk evaluation
- Performance analysis

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Advanced Planning

- Wealth enhancement, including cash flow, tax minimization and liability management
- Wealth transfer
- Wealth preservation
- Charitable giving

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Relationship Management

- Regularly scheduled calls, reviews and in-person meetings
- Team of professionals, including legal, tax, insurance and investment advisors

What to Expect From Our Second-Opinion Service

- We approach each new engagement with a time-tested consultative process. This allows us to have an open dialogue in which we learn about every client's values and goals while working with them to tailor a plan to help achieve them. We will meet with your friends, family members and associates for a Discovery Meeting. Assuming that we both agree that we have a basis for working together, they will return for the Investment Plan Meeting. Hopefully, we can confirm they are on track to fulfill their values and achieve their goals with their current financial provider. If needed, we will suggest ways in which we can help, including recommending another provider if we are not a good fit for their needs. Either way, they'll receive a Total Client Profile and a personalized analysis of their current situation – a value in excess of \$5,000.
- Let us help you help those you care about. Contact us today!

<http://www.elliscapitalmgmt.com/contact-us.html>



We will help you prepare for the future you've always envisioned.

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