INVESTMENT

PagnatoKarp
Transparent Family Wealth Advisors

Differentiating strategies to achieve your **unique** investment objectives.

True Fiduciary® Advice

Embrace the legal fiduciary obligation to place your interests first and target total financial well-being:

- 100% independent
- Fee-only financial advisor with complete transparency on fees paid
- Transparent portfolio that is viewable 24/7

Customized Investment Policy Statements

Custom, purpose-driven, tax-efficient portfolios:

- Lifetime Capital Needs®, Wealth Surplus®, and Aspirational Wealth™

Highly-customized and clearly defined portfolio parameters:

- Risk assessment
- Asset allocation modeling
- Cash flow, tax, and liquidity strategies

Individualized Portfolio Implementation and Monitoring

Dedicated in-house professionals focused on your goals:

- Advisor, Portfolio Manager, Trader, and Private Wealth Services Associate
- Quarterly in-person portfolio reviews

Customized approach to manage your portfolios:

- Diversification strategies using customized investment models
- Tax-efficient asset allocations
- Manager search, due diligence, fee negotiation and advocacy
- Trading execution through multiple exchanges, vehicles and financial institutions
- Ongoing portfolio rebalancing at no additional cost
- Liaison to 3rd party custodians
- Custom tax-loss harvesting, offsetting taxes on both gains and income

Innovative Investments

Access to:

- Traditional and digital assets
- Venture capital and alternative private investments
- Bridge loans and mezzanine debt
- Customized structured notes
- Separately managed accounts

pagnatokarp.com 703-468-2700
11951 Freedom Drive, Suite 1260, Reston, VA 20190

Disclosures

Wealth Management and Family Office Services are provided by PagnatoKarp Partners, LLC ("PagnatoKarp"), a SEC registered investment adviser. Registration with the SEC does not imply any certain level of skill or training. Investment products and services offered by or through PagnatoKarp are not insured by the FDIC or any federal or state governmental agency, are not deposits or other obligations of, or guaranteed by any banking institution and may be subject to investment risks, including the possible loss of principal value or amount invested. Past performance does not guarantee future results. Investors should consult with their advisors as to the appropriateness of investing in any strategy. PagnatoKarp uses 3rd party custodians.

True Fiduciary® is a registered trademark used by PagnatoKarp to underscore our commitment to transparency. All registered investment advisers are required by law to act in a client's best interest. Comments and ideas expressed herein are that of the author and are subject to change at any time without notice. Comparisons made reflect the requirements of a broker dealer versus registered investment adviser.

Not all services are offered to all clients. PagnatoKarp offers advisory services to clients based on individual client needs and circumstances. Information contained in this presentation is for informational purposes only and should not be construed as an offer to invest in any particular financial instrument. Information contained in this presentation was sourced either directly or derived from third party entities, the accuracy of which we are not responsible for, nor is it guaranteed. Investing can pose substantial risk of partial or total loss that you should be prepared to bear before making an investment decision.

pagnatokarp.com 703-468-2700
11951 Freedom Drive, Suite 1260, Reston, VA 20190