



Intelligent Investing[®]

ADVISORS

INSIGHTFUL · INDEPENDENT · INNOVATIVE

MINIMIZE FINANCIAL STRESS TO MAXIMIZE YOUR LIFE

WHAT MAKES US DIFFERENT



FEE ONLY | We are an independent, fee-only registered investment advisor with a fiduciary responsibility to act in your best interest at all times. We are paid only one way—by our clients. We are incentivized to make sure you are in the right portfolio based on your goals and risk tolerances.

INDEPENDENT FIDUCIARY ADVICE | Unlike many firms, we do not sell any products such as insurance or annuities, nor are we paid by others for putting you into investments that may not be in your best interest.

INSIGHTFUL | We have some of the top investment and planning credentials. We coordinate and collaborate with other professionals such as CPAs and estate planning attorneys to ensure your plans are executed properly.

INTELLIGRATIONS[®] | We are risk managers, asset allocators, and behavioral coaches. Our proprietary financial technology, Intelligrations[®], helps us organize your financial “junk drawer” to give us the best chance to meet your long-term goals and to help you stick to your plans.

INVESTEDWITHYOU.COM

(864)679-0500

CORE VALUES

COMPASSION

We are all given time, talents, and money to help those in need.

LEGACY

We believe passing on family values is more important than passing on valuables.

INTEGRITY

Our moral compass enables us to put your interests first.

EXCELLENCE

We never settle and constantly want to improve your experience.

NIMBLENESS

We have the flexibility to meet your needs in an ever-changing financial world.

TRUTH

We speak the truth in love in every communication and relationship.

OUR SWEET SPOT CLIENTS (\$1M+ INVESTABLE ASSETS)

PRE-RETIREES AND RETIREES

50+ year olds with 401k
and retirement transition needs

HENRYs (High Earners Not Rich Yet)

Younger couples with \$250k+ investable assets

SUDDEN WEALTH

Widows, inheritors of wealth, business
owners selling a business or property

CHARITIES

Institutional wealth management —
endowments, foundations, donor advised funds



**INTELLIGENT
MONEY MINUTE**
P O D C A S T