Enduring principles in a changing world

WESCAP Group

In a constantly changing world, we strive to anticipate rather than react.

SEEING WHAT OTHERS MAY NOT

SERVING OUR CLIENTS

At WESCAP Group, our ideas, experience and insight are focused on a singular objective: to deliver exceptional investment management and thoughtful financial advice to our valued clients.

The benefits of our disciplined investment approach are apparent across a wide range of market conditions. Our clients maintain peace of mind knowing that we continually seek attractive risk-adjusted opportunities on their behalf.

We are objective, unbiased, and pursue the highest possible standards in everything that we do.

Our distinctive attributes are:

- **Visionary portfolio construction**
- **Extraordinary client retention**
- **Extensive experience & education**
- **Quantifiable results**
- **Independence and integrity**

ANOTHER FORM OF ORDER

CUSTOM SOLUTIONS

With over a century of combined advisory experience, our team brings compelling professional knowledge and insight to each client relationship. Our culture and disciplined process support a collaborative environment where specialized knowledge and individual expertise are leveraged for your benefit.

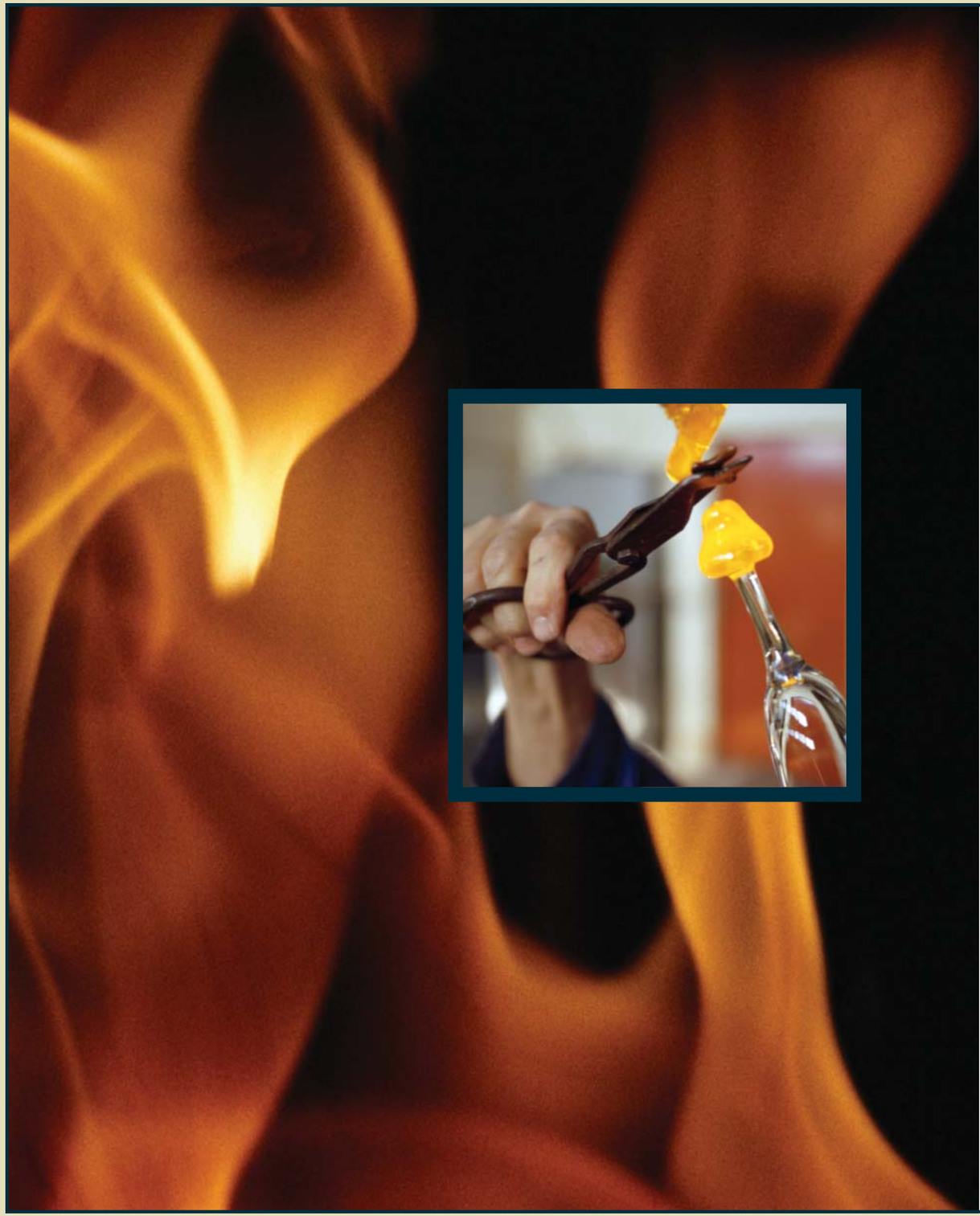
Custom financial solutions are forged through extensive research and the careful analysis of your unique needs and aspirations.

WESCAP Group's mission is to preserve our clients' assets and grow their wealth through exceptional investment management and thoughtful financial advice.

Our fiduciary responsibility is always to the client. Core elements of our fiduciary model are:

- **Completely independent**
- Fee-only
- No commissions
- Full disclosure
- SEC-Registered Investment Adviser

Thought, research and a disciplined process facilitate the careful analysis of each client's situation.



We continue to pioneer investment strategies that seek superior results for our clients.

THE AESTHETICS OF RISK

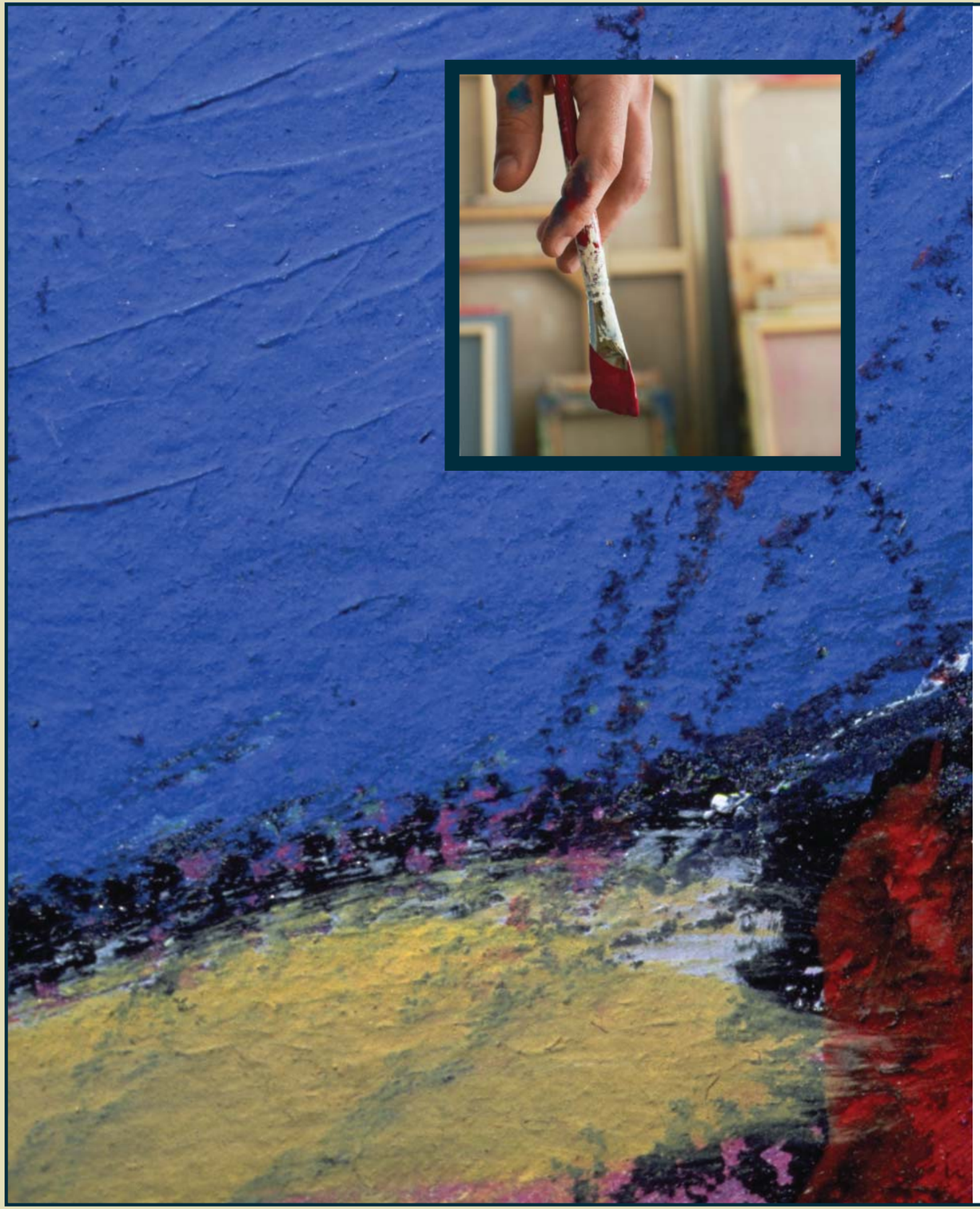
THE CORE OF WHAT WE DO

Compelling ideas lead to possibilities, which in turn, create opportunities.

We are innovators in constructing globally- and strategy-diversified investment portfolios. We reduce risk by opportunistically seeking under-valued asset classes and strategies.

Our investment approach strives for outstanding risk-adjusted returns across a range of market conditions. The central tenets are:

- **Strategic & tactical asset allocation**
- **Broad global diversification**
- **Contrarian/Value-oriented**
- **Low transaction and ownership costs**
- **Tax efficiency**



MOVING BEYOND THE PIE CHART

SEEING YOUR TOTAL PICTURE

We work closely with you to define and manage important aspects of your financial life.

Our approach begins with in-depth conversations to help us thoroughly understand your goals, tolerance for risk and particular needs. This critical insight serves as the foundation for creating the plan — strategies and tactics — that will help reach your goals.

Financial planning serves as a complement to our core investment management offering. We frequently provide financial advice on the following:

- **Retirement projections and planning**
- **Estate and gift planning**
- **Education planning**
- **Risk management review**
- **Tax planning**
- **Employee benefits analysis**
- **Cashflow and debt management**
- **Charitable giving**

Our insight deepens through the planning process, helping to ensure that your plan aligns with your values and goals.

The experience, discipline and insight of our advisory staff sets the firm apart.

CHOOSING TO PARTNER WITH US

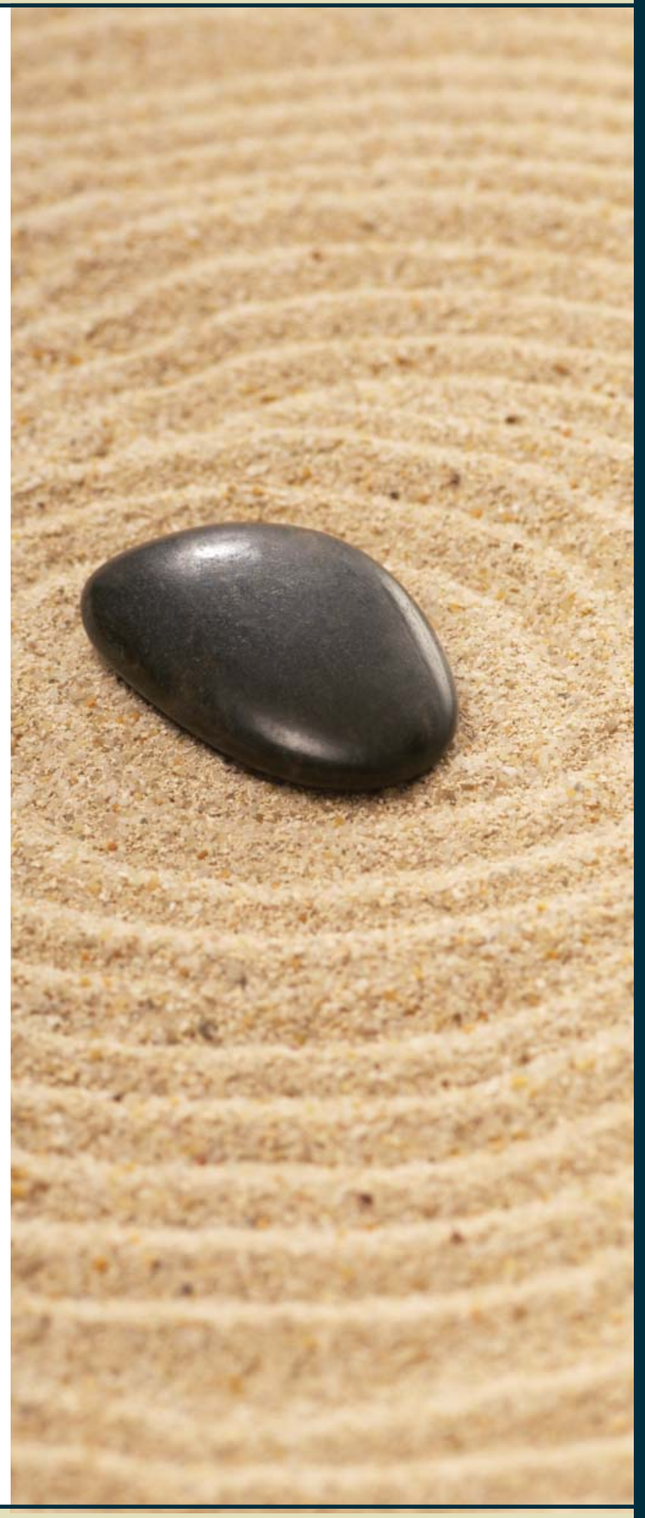
ENDURING PRINCIPLES

We provide a broad range of fee-only services to a diversified client base of high-net-worth individuals and families.

Founded in 1988, WESCAP Group is headquartered in Burbank, California, and serves clients throughout the United States.

Our extraordinary client retention rate is driven by long-term performance, thoughtful financial advice and an unwavering commitment to putting our clients' interests before our own.

To explore how you may benefit from our services, please call: **(800) 820-2453**



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