

We are an independent wealth advisory firm which works with families to simplify their financial lives. Though we do many things, it's our deep and intimate relationships that make the biggest difference. Managing wealth is complicated, but we are here as a wealth strategist and investment professional—guiding every step of the way.

BOUTIQUE ADVISORY SERVICES PAIRED WITH INSTITUTIONAL QUALITY INVESTMENTS



A FEW FACTS AND HIGHLIGHTS ABOUT OUR FIRM

INDEPENDENT

Unaffiliated with banks, brokerages or managers

EXPERIENCED

Accredited and tenured professionals

FLEXIBLE

Discretionary or non-discretionary management

NATIONAL

San Francisco, CA, and Chapel Hill, NC

TRANSPARENT

Fee only and no commissions

AWARD-WINNING

Named by the *Financial Times* and *Financial Advisor* as top firm* in 2015

WEALTH PLANNING

Your existing relationships often remain a productive part of the process. The difference is the coordination and execution. **We do not compete with your existing providers. We work with them.**

- » **WEALTH PLANNING OBJECTIVES & STRUCTURES**
- » **ESTATE TAX & INCOME** » **CASH MANAGEMENT**
- » **RISK MANAGEMENT** » **SITUATION ANALYSIS**

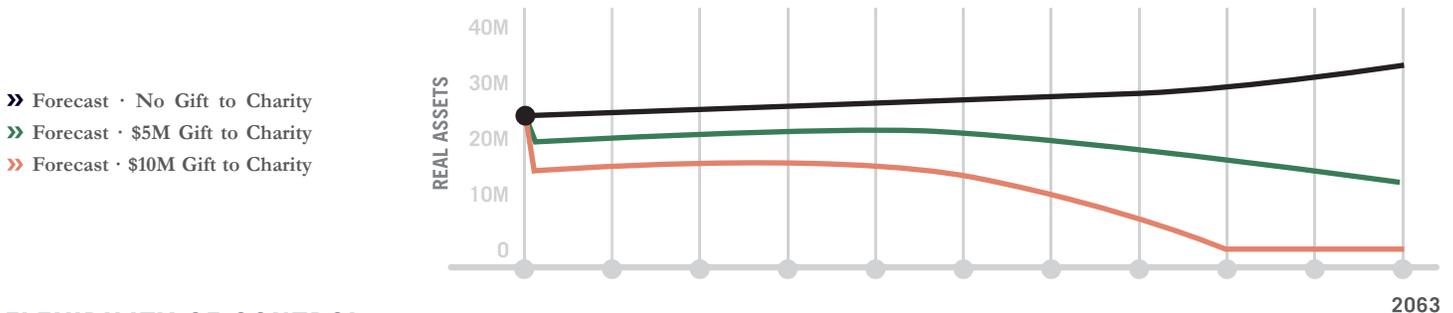
We give financial investment advice. Unlike many big banks and brokers, we're not selling investment products, and we have no motive to recommend one investment over another. To create an investment strategy for you, we take into consideration your:

- Risk Tolerance
- Time Horizon
- Liquidity Needs
- Legal and Regulatory Constraints
- Taxes
- Leverage
- Portfolio Implementation

Delegate is different for these simple yet profound reasons:

THOROUGH PLANNING

Rather than rely on historical data and trends, to provide financial advice for each family we painstakingly build predictive models to help us answer the most difficult of wealth-related questions.



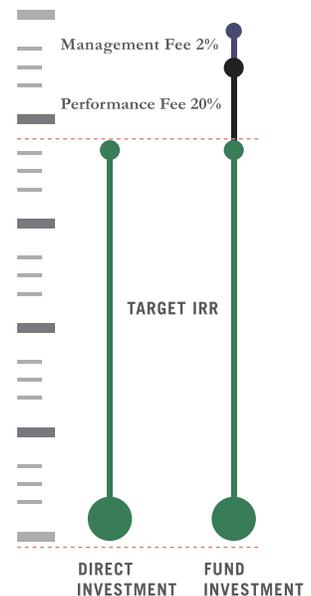
FLEXIBILITY OF CONTROL

We give you as much control as you would like, keeping you as involved as you would like to be, managing assets on a non-discretionary or discretionary basis.



DIRECT INVESTMENTS & IMPACT INVESTMENTS

No matter where the idea came from, we can research it and then facilitate the investment on our clients' behalf. Often times by going direct instead of through a fund we can dramatically lower the fees the client pays, thereby improving the overall return of the investment.



Delegate Advisors Ranked Among *The Financial Times* Top 300 Wealth Advisors and Included in *Financial Advisor* magazine's Top RIAs for 2015



*The FT 300 list is produced independently by the Financial Times, which evaluates RIA firms that apply on six criteria: Assets Under Management (AUM); AUM growth rate; years in existence; advanced industry credentials; online accessibility; and compliance records.

The Financial Advisor list is comprised of 562 advisor firms from across the country, taking into consideration asset growth, referrals from clients and institutions, human capital, marketing and strategic partnerships with other professionals. The survey measures industry-wide trends and growth, then ranks each firm accordingly.