Independent, Prudent Wealth Management

www.thebamalliance.com Being a true, independent wealth advisor is a lot more than just handling your BAM provides portfolio management and investments. We take a look at your total financial picture - your aspirations, back-office services to a select group of your relationships, your assets, your insurance policies, your trusts, business, America's most knowledgeable and successful independent financial advisors and their and interests. From there we create a holistic plan that helps you and the most clients. These services include portfolio stratimportant people in your life meet your long-term goals. egies and programs, operational processing and educational support and training, freeing your advisor to provide a comprehensive, personalized approach. **BAM Advisor Services** We believe in using the science of investing to drive better decisions about your money and your future. That means having a well thought Fee-Only out plan and having the confidence to know that it's been built to withstand the day-to-**Investment Strategy Fiduciary** day, week-to-week turbulence of the financial markets. With evidence-based investing, you **Our Alliances** can focus on the destination and more easily Advisor eniov the ride. Strategic Investment Partners Cypress Asset Management, Inc. Dimensional Fund Advisors (www.dfaus.com), Vanguard (www.vanguard.com), Bridgeway Custodian (www.bridgeway.com) all provide you with **Schwab Institutional** low-cost broad diversification and serve well as portfolio building blocks. www.schwabinstitutional.com/public Schwab provides the basics that any good custodian should have: the means to help firms run more efficiently and great service Client offered to clients. Attorney/ Advanced Charity Insr. Agent/ Assets Plannina CPA