

The LionShare ADVANTAGE

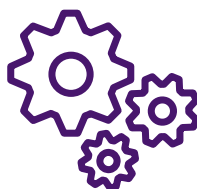


*Integrity * Innovation * Independence*

LionShare is a portfolio management platform at Regal Investment Advisors. Regal is a firm built by advisors with the virtues of integrity, innovation, and independence in mind. Our founders and principals personally produce and thrive on using their experience and expertise to help affiliated advisors elevate their business to the next level. We do this through our consistent commitment to provide support and practice management resources that help and inspire independent advisors to better serve their clients.



Experienced Field
Leadership



Practice Management
from Producers



Coaching



Pragmatic
Compliance



Training From
Experienced Advisors



Insurance
Friendly



Marketing Support



Mentoring



Customized Branded Strategies

LionShare is a portfolio management platform at Regal Investment Advisors. Through this distribution channel, we provide money management strategies that provide a wide array of products giving advisors a solution for just about every client scenario. There are 50+ options for outside RIAs to work with the scale at Regal RIA to fit client solutions to their needs.

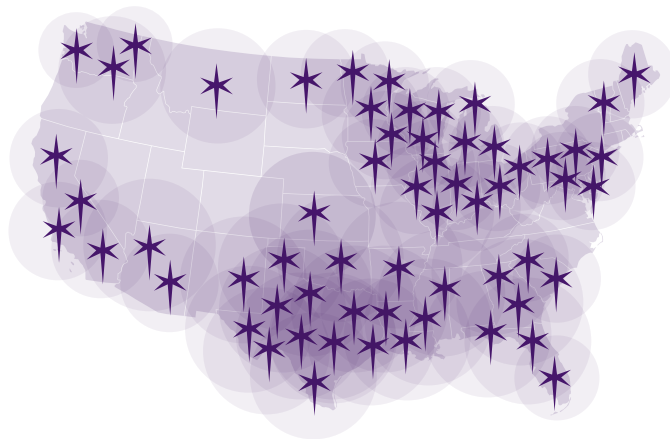
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Investment advisory services offered through Regal Investment Advisors, LLC, DBA LionShare, an SEC Registered Investment Advisor. Registration with the SEC does not imply any level of skill or training. Please refer to Regal Investment Advisors, LLC's and LionShare's ADV Part 2A for more information.

Industry Leading Technology



National Footprint



Custodian Agnostic



OVER \$1.9B AUM

Front line Leadership

Kevin Berwald, CLU®, ChFC®, CFP®, CASL®

National Sales Manager, VP of Distribution LionShare

Bill Best, CPA®, CA®

Chief Operations Officer / Chief Financial Officer

Don Carlson, CFEd®

Executive Vice President / Partner

Heather Christman

Client Service

Jordan Fischer, CFP®, AIF®

Asst. Portfolio Manager

John Kailunas II, LUTCF®, FSS®

Chief Executive Officer / Founder

Sonya Lincolnhol

Portfolio Manager

Larry Taunt, CLU®, CFP®, ChFC®, CASL®

Portfolio Manager / Founding Member

Brian Yarch, CLU®, ChFC®, LUTCF®

Equity Partner



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