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Investec Advisory Group, L.P.

NABCAP PREMIER ADVISOR 2012

Top Wealth Managers

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The primary focus of NABCAP, a nationally registered 501(c)(3) nonprofit organization, is to serve the needs of investing public by helping identify top wealth managers. NABCAP and it's Board of Directors created an unaffiliated evaluation process in which 20 categories of practice management are assessed. Advisors are invited and/or nominated to participate by submitting an online questionnaire. The multi-step verification process utilizes independent resources to assess the accuracy and truthfulness of the information submitted by participating advisory practices. NABCAP's methodology is unique in deciphering advisors because it is primarily objective, not subjective and helps add transparency for the investor's benefit. NABCAP takes pride that their list of Premier Advisors is not merely defined by Assets Under Management (A.U.M), revenues produced or even worse, popularity. Alternatively, NABCAP attempts to identify top advisors regardless of size, firm or channel they are affiliated with. The ultimate goal is to provide investors and advisors a trusted standard of excellence to help guide them within the Financial Services Industry.

Through our process the investing public will clearly identify practice specialities and areas of excellence. NABCAP strives to create a platform and process through which transparency becomes both expectation and the industry standard. The investing public requires advisory practices to be in line with their needs and goals.

www.NABCAP.org

Average Assets Per Client
$2,730,000

Avg. # Of Clients Per Advisor
25

Advisors to Support Staff
4:4

Credentials
CFP®, AIF®, CIMA®
CPA/PFS

Top 5 Specialties
RP, IM, RM, EP, CM

Specialities
RP=Retirement Planning
RM= Risk Management
IM=Investment Management
EP= Estate Planning
CM=Comprehensive-Wealth Management