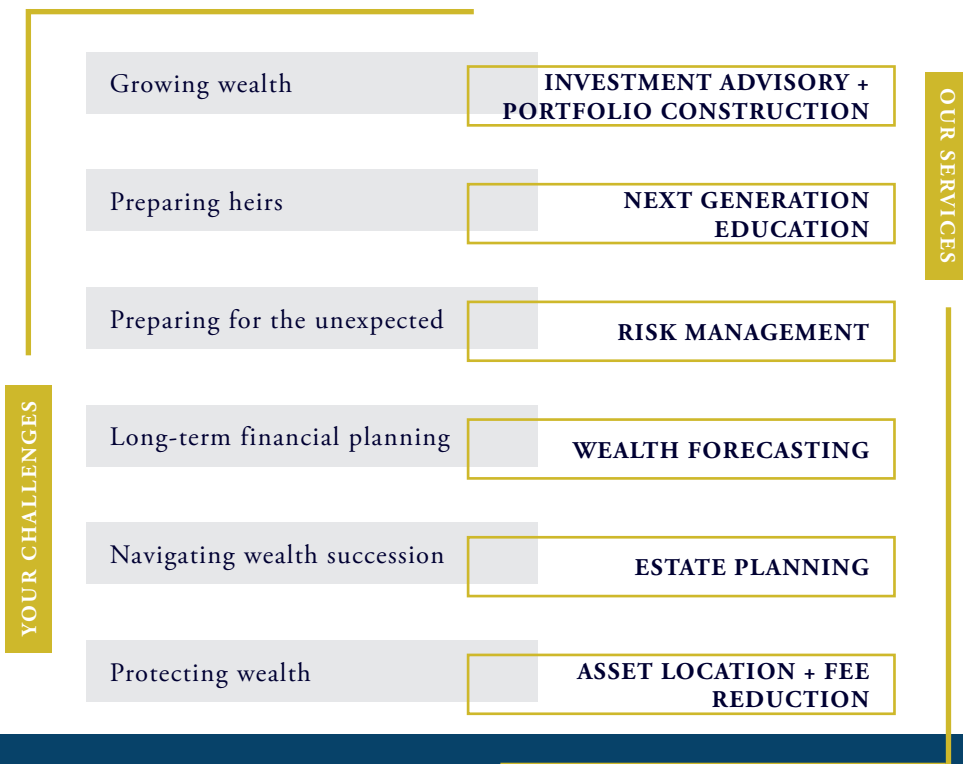


# AT THE INTERSECTION OF Life + Wealth

Delegate Advisors is an independent wealth advisory firm that works with families to simplify their financial lives. Life with wealth can be complicated but we are here to guide families every step of the way.

## OUR SERVICES DIRECTLY ADDRESS REAL-LIFE CHALLENGES YOU EXPERIENCE:



## WHO WE ARE *at a glance*

### INDEPENDENT

Unaffiliated with banks, brokerages or managers

### EXPERIENCED

Wealth strategists and investment professionals

### FLEXIBLE

Discretionary or non-discretionary management

### NATIONAL

San Francisco, CA, and Chapel Hill, NC

### TRANSPARENT

Fee only and no commissions

## WEALTH PLANNING

Understanding what matters to you allows us to create a wealth action plan that addresses each of your financial challenges. As part of the process, your existing relationships often remain a productive part of our working relationship. We do not compete with your existing providers - we work with them.

Delegate received the Family Wealth Report Award in the category of Multi-Family Office (up to and including \$2.5B of AuM/AuA) in 2018 and was named on *The Financial Times* Top 300 Advisors list in 2017.

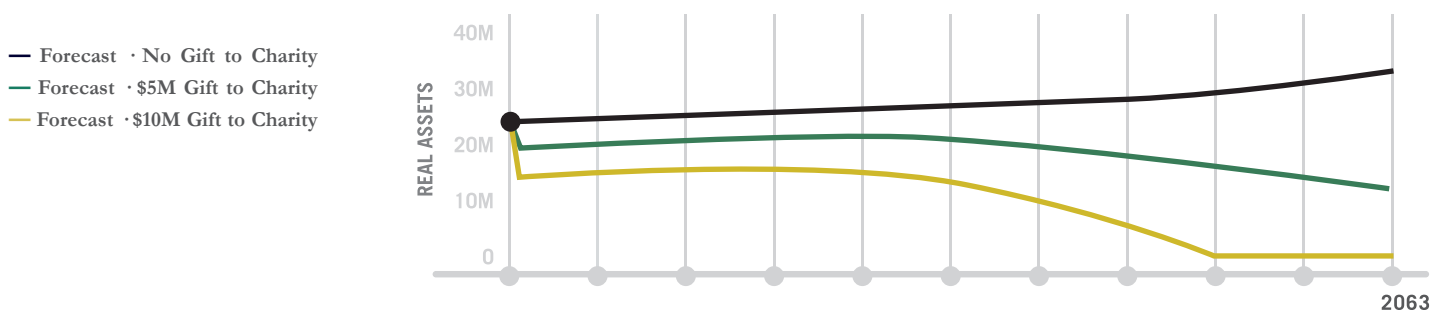


## DELEGATE IS DIFFERENT

*for these simple yet profound reasons:*

### 1 — THOROUGH PLANNING

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

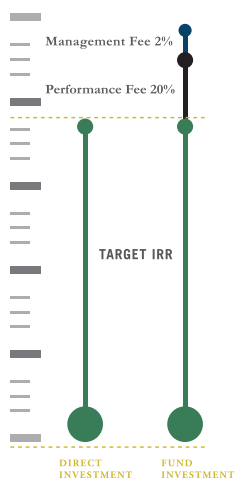


### 2 — FLEXIBILITY OF CONTROL

We manage assets on a non-discretionary or discretionary basis - keeping you as involved as you would like to be.

NON-DISCRETIONARY

FULL DISCRETION



### 3 — DIRECT INVESTMENTS

No matter where the idea comes from, we can research it and then facilitate the investment on our clients' behalf. Oftentimes, fees on direct investments can be lower than on funds, improving the expected return of the investment.

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 Family Wealth Report Awards judging process is focused around three main areas: experts (individuals and teams), products and services (for wealth managers and clients/institutions of all sizes and types). To avoid any conflict of interest there are three judging panels.

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