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OUR VISION

To transform our clients' lives through long-term planning, consistent execution, intelligent investment and thoughtful insight.

ERITAS WEALTH MANAGEMENT, LLC is an independent, fee-only financial planning and investment management firm. Our philosophy and the academic principle that guides our practice is a disciplined approach to our investment philosophy and the academic principle of putting our clients and their interests first.

OUR MISSION

To guide our clients along a secure and rewarding path toward realizing their financial goals. We seek to build a long-term partnership and build trust that endures over time. Integral to our mission is our commitment to



cure in the knowledge that any advice we give you is objective and given with your best interests in mind.

JR CORE PURPOSE IS TO:

- Inspire our clients to strive for what's important in their lives;
- Educate our clients on how to best achieve their financial goals; and
- Guide our clients on their path towards realizing their dreams.

thoughtful and comprehensive financial planning, and a continued commitment to the long-term success of our clients.

begin your personal journey towards financial well-being.

JR PHILOSOPHY

Financial planning is a core component of any wealth management strategy. With your best interests in mind, we develop a plan based on the fundamentals specific to your personal situation and to principles that have proven to increase long-term wealth. Our investment philosophy is based on financial science and rigorous research, which has demonstrated that a disciplined, long-term investment strategy managed with a disciplined rebalancing methodology, will, over the long term, provide superior results.

KEY TENETS OF THE MERITAS INVESTMENT PHILOSOPHY:

- Without exception, we strive to meet the fiduciary standard. As the client, you come first.
- We customize and manage tax-efficient portfolios.
- We strive to optimize portfolios for greatest return balanced with consideration for diversification and risk management.
- We seek to minimize unnecessary risk through coordinated diversification.
- We maintain portfolio allocation through systematic rebalancing.
- We apply disciplined portfolio management.
- We utilize low-cost institutional class investments.

SEVEN CORE VALUES YOU CAN EXPECT FROM MERITAS

1. Integrity. We do the right thing by our clients by always putting their interests first.
2. Respect. We create an environment of mutual respect. We listen attentively and honor your wishes.
3. Honesty. We tell the truth. We will be forthright and candid with you.
4. Service. We're committed to offering you personalized attention and service that exceeds your expectations.
5. Confidentiality. We will closely safeguard your personal information at all times.
6. Teamwork. We will approach your financial plan as a coordinated team effort, incorporating the expertise and knowledge and resources to ensure that you receive the full benefit of our collective wisdom.
7. Discipline. Comprehensive financial planning is a continuous and dynamic process that evolves with the changing circumstances of your life. Because we want you to gain confidence in taking action on your financial plan. Once that plan is established, we adhere to a systematic process for implementing and adjusting it to changing circumstances.

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SONOMA COUNTY

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