



RHS Financial is devoted to the creation of meaningful wealth for our clients through aspirational financial planning and the power of the capital markets.

WHY WE ARE HERE

We provide an investment experience that is focused on delivering results and that gets people to think bigger about their finances. Why? As experts with years of experience in the investment industry we learned what works and, most importantly, what doesn't.



builds on the theme of *abundance*. Unlike the usual financial planning goal of just getting by and not outliving your money, the goal of *aspirational financial planning* is to start today, build a framework for financial success that could build the kind of wealth that makes a real difference to you, your family and your community. The kind of wealth that could create a retirement that is the envy of your peers, establish a legacy that will outlive you and perhaps, meaningfully alter the lives of others through the capacity for sustained charitable giving. We encourage you to *think bigger about your personal finances* and *build your wealth with us*.

FOCUS ON WHAT WORKS

□ Disclaimer

Our Story

As a former Wall Street professional with years of experience in some of the biggest brokerage houses in

Our Solution

Our solution gives our clients a systematic framework that helps them build true wealth. It is both robust



struggle. We work to change this reality, and founded the firm on this principle. We know what works when it comes to investing, and we wanted that for our clients too. When Risley left the brokerage world and founded RHS Financial in 2009, it was with his client's best interests in mind. Since then we have been delivering valuable investment advice that allows individuals and families to invest with purpose.® Our goal is to combine combine institutional investing insights with aspirational financial planning and wealth management strategies to deliver superior results.

with positive behavioral patterns in an attempt to produce results far beyond just investment performance.

WHAT YOU GET

1 Independent, financial planning and investment advice.

We are fiduciaries and have a duty to you as the client to act in your best interest. What we offer is independent financial advice designed to help you grow your wealth and make smarter decisions with your money. We do not sell "packaged financial products" nor do we receive any compensation from outside vendors. We provide advice and financial planning services for a straightforward fee.

2 Low fee, rules-based investment portfolios

The modern financial landscape is full of hidden fees, opaque results and other potential potholes. Those fees eat away at your net return on investment. We strive to keep our clients investment costs as low as possible while generating risk-adjusted returns tailored to fit each client's risk tolerance. In addition, we believe maintaining a diversified portfolio is the surest path to investment success. Our rules-based portfolio monitoring process regularly rebalances your accounts to favor undervalued assets while targeting a level of risk you're comfortable with.

3 A framework for financial success

We help our clients think bigger and in a different way about their personal finances. With aspirational financial planning, we ask them to stretch the limits of what they think true wealth can be and, as a consequence, create more financial security and stability in their lives. At RHS, we understand that even the most efficient,

4 Peace of mind

Having peace of mind that you have hired a trusted advisor to help you make smart decisions with your money is one of the biggest benefits of working with RHS. Building and maintaining wealth is a marathon, not a sprint. Having a coach with experience can mean the difference between success and falling short of your desired goals.



CONTACT US NOW
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