





## WHAT MAKES INTEGRATED D DIFFERENT?

The Integrated approach is unique and proprietary. Our dedication to excellence in all phases of the client-advisor relationship is unmatched. Here are a few of the ways in which our stewardship of each client's wealth rises above the crowd.

## WE ARE A FIDUCIARY

As an SEC Registered Investment Advisor (RIA) and fiduciary, our team acts solely in the best interest of each client. We focus exclusively on his or her goals while providing full transparency into our fees and process.

## WE ARE INDEPENDENT

In addition to widely held securities, Integrated provides unique and customized investment solutions not often available at major brokerage firms. Our focus on blending traditional and non-traditional investments helps to enhance portfolio risk/return characteristics and enables us to best serve each client's needs.

## WE ARE THOUGHTFUL

The foundation of our process is the development of an in-depth and comprehensive understanding of each client's specific circumstances, needs, and aspirations. Investing time to build relationships and asking the relevant questions are paramount to our process. The better we know and understand each client, the more effective we can be as advisors and advocates.

## WE EXECUTE

Integrated believes the best plan is not effective unless it is successfully executed. Our relationship framework enables coordination with each client's advisory team to support the successful execution of his or her plan. Appropriate planning and follow-up lead to effective implementation, while periodic reviews verify that the underlying approach continues to be sound.

## WE BELIEVE IN EXCEPTIONAL SERVICE

The Integrated team takes client service to heart. Our boutique structure and client-centered approach allow each client to enjoy unparalleled accessibility, execution, and follow-up. We have a sincere interest in each client, and strive to demonstrate that through exceptional service in all phases of the relationship.

## WE SIMPLIFY

Obtaining an insightful view and a detailed understanding of an investor's global portfolio can be a challenge. At Integrated, we provide each client with

a comprehensive reporting platform that captures and reviews his or her entire portfolio in a simple, yet thorough manner.

## WE ADVOCATE FOR YOU

Integrated aims to provide value beyond merely managing investments. We pursue creative business opportunities and solutions, as well as leverage our extensive network to support each client's goals and objectives.

### CULTURE

[Our Vision](#)

[Our Mission](#)

[Our Core Values](#)

### COMMUNITY

### SERVICES

[For Entrepreneurs & Family Offices](#)

[For Nonprofits and Foundations](#)

OUR TEAM

CONTACT

Schwab Alliance

Black Diamond

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