

ALDA



SOMETHING
MORE THAN
EXPECTED

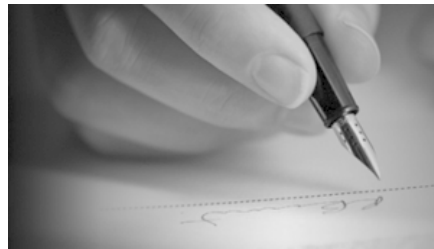
VALDA's unique advisory platform provides for all of your investment, legal and strategic services under one roof. Creating objective oriented living is our mission.



WEALTH MANAGEMENT

We're not what you might expect. We are more than your standard wealth management firm. We are a firm built on a foundation of rigorous discipline, but we are nimble and adaptive in assessing and acting on new opportunities and challenges. A firm with innovation at its core. An organization that combines the resources of our experienced team and the care and commitment of a small firm.

- Investment management



GENERAL COUNSEL SERVICES

When is the last time your financial advisor talked to your attorney? When is the last time your financial advisor talked to your tax advisor? When is the last time your financial advisor talked to your estate planning attorney? Do these different critical players in your financial life know each other? Do they realize they are on the same team—your team?

Valda's integrated approach to your financial well-being is truly unique. For our high net worth clients, we provide



STRATEGIC PLANNING

We help our clients envision a desired future and translate their vision into broadly defined goals and objectives. We begin with the end in mind and from there design our plan in reaching your goals.

- Map the present situation
- Envision the elements of an idealized future
- Prioritize vision elements
- Develop actionable objectives
- Develop and prioritize potential strategies

- Wealth and estate planning
- Coordinated private banking services
- Financial planning and modeling
- Risk management and insurance services

access for you, to a full service firm with forward-thinking attorneys in the areas most central to your financial life: estate and tax planning, business and real estate law and general counsel services.

- Business law, corporate counsel, business purchases and sales, entrepreneurial start ups, and intellectual property
- Estate and tax planning for business owners and entrepreneurs
- Business and commercial litigation and dispute resolution
- Commercial and residential real estate transactions and litigation
- Construction defect and construction litigation

- Define metrics, timelines and responsibilities
- Implement and act



Wealth Management

OBJECTIVE ORIENTED LIVING

Our approach is about relationships

This means we can get to know you on a personal basis. It means face-to-face meetings with a trusted partner. Our relationships span decades and generations, not just months or years. As an independent company, we're not bound to in-house products, families of funds or a single investment approach. This allows us to create an innovative, personalized plan for each client - a plan that addresses your specific needs and goals without bias or limitations.



LEGAL

BUSINESS | ESTATE AND TAX PLANNING
REAL ESTATE

A full service firm available to meet all your needs

We are not all about wealth management. Our approach is quite different.

When is the last time your financial advisor talked to your attorney? When is the last time your financial advisor talked to your tax advisor? When is the last time your financial advisor talked to your estate-planning attorney? Do these different critical players in your financial life know each other? Do they realize they are on the same team—your team?

Valda's integrated approach to your financial well being is truly unique. For our high-net -worth clients, we provide access to attorneys experienced in the areas most central to your financial life: estate and tax planning; business and real estate law; and general counsel services.

LEGAL DISCLAIMER (*/disclaimer*)



STRATEGIC PLANNING

OBJECTIVE ORIENTED LIVING

Align your roadmap and goals

Our systematic process of envisioning a desired future, and translating this vision into broadly defined goals or objectives and a sequence of steps to achieve them is our approach. We begin with the end in mind and from there design our plan in reaching your goals.

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