

Equius clients share one essential characteristic.

Intellectual curiosity.

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Our secret?

No secrets.

Information is indeed power, and it is most powerful when shared. We believe in complete transparency, in open-source knowledge. We encourage our clients to question the status quo, and the motives of those who defend it.

Leadership

In the early 1990s, the founders of Equius Partners left the Wall Street herd to embrace a new approach to investing, based on the recognition that markets

embrace a new approach to investing, based on the recognition that markets and investing science have changed dramatically in the modern era. As one of the first financial planning and investment advisory firms to fully reject traditional active management and adopt a more optimally diversified and structured asset class investing strategy, Equius took the lead and never looked back.

Philosophy

We believe that knowledge is the foundation upon which successful portfolios are built and maintained. Not simply a knowledge of investment principles, but a deeper knowledge of who we all are as individuals and investors. Knowledge leads to confidence and confidence fosters discipline when it is needed most. Adherence to these principles inevitably leads to investment success.

Science

Our investment approach is grounded in the work of Eugene Fama, recipient of the 2013 Nobel Prize in Economic Sciences for his work on the efficient market theory. Fama, along with his colleague Ken French, also introduced groundbreaking research demonstrating that markets are multidimensional (in terms of risk and return) and that long-term portfolio results can be enhanced with thoughtful diversification among these dimensions.



Wisdom never gets old.

Everyone on the Equius team believes that adhering to our proven investment principles is the key to your success. We are focused and disciplined, but also realize we must continue to nourish our own intellectual curiosity around new technologies, new research and new generations of investors.

That's the difference between knowledge and wisdom.



Judy Arntz

Client Service
Coordinator



Alex Bialeck

Operations Manager



Rick Borden,
CFP®, AIF®

Relationship Manager



Jenifer Harvey

Client Service
Coordinator



Nick Humphrey

COO, Chief Compliance
Officer



Equius Expertise

By sharing our knowledge of modern investing principles with you, and by aligning those principles with your personal goals and aspirations, we help develop the confidence and discipline

necessary for you to achieve superior results through all market cycles.

Our no-nonsense approach to investing is a refreshing change for investors who have been dissatisfied with traditional investment firms. Our clients include educators, physicians, attorneys, business owners, and retirees. Some have modest income and wealth. Others have more. They are fathers, mothers, sons, and daughters; trustees, charities, 401(k) plans, foundations, and endowments.



Portfolio & Behavior Management

We build and maintain sound portfolios and handle the challenges associated with long-term investing through effective listening and professional counsel. We work hard at changing behavior that may have undermined investment progress in the past.



Customized Financial Planning

While our core principles are unwavering, we recognize that every investor is different. So, we design plans that are tailored to your needs, your goals, and your life aspirations.



Generational Wealth Counseling

Creating a plan to transfer wealth generationally can be complex and emotionally challenging. We take all the time necessary to understand your true intentions, and work with you to create a plan that provides lasting financial comfort for your family and other potential beneficiaries of your wealth and values.



Retirement Plan Solution

Whatever your vision of the ideal retirement, you will need a long-term plan that ensures stable and sustainable income regardless of unexpected life events or market circumstances. If you are a corporate plan sponsor, we offer modern, lower-cost solutions to meet your employees' goals and your fiduciary responsibility.



Working with Equius



Let's define wealth.

Not surprisingly, it's different for everyone. Let's dive deep to determine what wealth means to you, in relation to your current investments, ambitions and aspirations. Once we define it, we will help you achieve it.



Welcome to Equius 101.

Based on our initial conversations with you, we create a strategic roadmap for your financial journey. We share our knowledge and confidence in a way—and at a pace—that suits your particular situation. We consider a lifelong commitment to learning and practicing core investment principles as essential to your success.



Review. Refine. Reassure.

Once your investment plan is in place, we schedule annual performance reviews and regular check-ins. As market conditions change, we manage your portfolio according to the plan (always considering taxes and other costs). As your life changes, we recommend changes that address your changing needs. Ours is a collaborative approach with one goal in mind: providing you with the stable, comfortable, predictable, and successful advisory relationship you deserve.



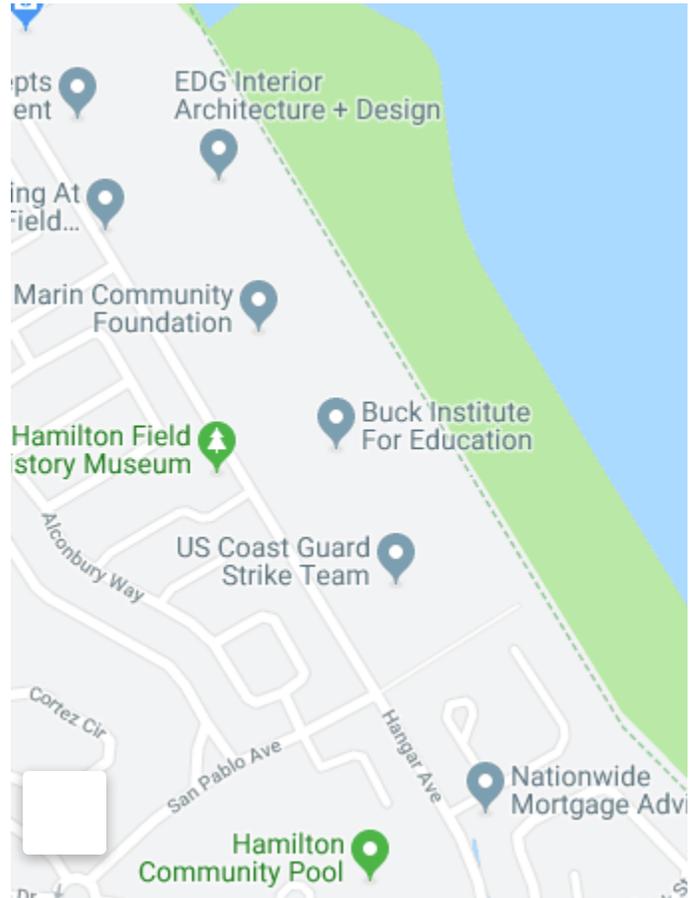
“The world would be so much better off if everyone fully understood the implications of the idea that markets work.”

Rex Siquefield

Co-Founder, Dimensional Fund Advisors

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