

THE FUTURE IS A GREAT **PLACE TO START.**

ONLINE INVESTING FUELED BY KNOWLEDGE, **SIMPLIFIED BY TECHNOLOGY.**

[GET STARTED \(getstarted.html\)](#)

INVESTING WITH **PURPOSE**



You have the right to define your future. With the help of advisors, we promise to guide you through the many choices offered at Exceptional Portfolio, to arrive at the ones that perfectly align with your life, your goals, and your values. We decided it was time for change.



GUIDED BY **VALUES**
DOING WELL BY **DOING GOOD.**



WE AVOID

industries and practices that our investors find objectionable.



WE SEEK

out companies that are dedicated to protecting the environment.



WE SUPPORT

companies that allow women and minorities to reach their full potential.

Social responsibility promotes positive change for yourself, your family, and your community. Our team at Exceptional Portfolio is passionate about helping you build a bright future, and we believe this can be done through a conscious and responsible investment process. Let us help guide you on an investment journey that promotes positive growth for both yourself and your community. This isn't about your money, it's about your future. Click below to learn more about socially responsible investing.

LEARN MORE ABOUT OUR
EXCEPTIONAL APPROACH TO SUSTAINABILITY.

[SOCIAL RESPONSIBILITY \(SRI.HTML\)](#)

EXCEPTIONAL **RATES**

LET US GET YOU WHERE YOU'RE **GOING.**

\$20,000 ACCOUNT BALANCE

ACCOUNT EXAMPLE

TRADITIONAL RATES

1.50%

ANNUALLY

\$300/YR

exceptional portfolio

0.75%

ANNUALLY
\$150/YR

We're dedicated to making online investing available to everyone, regardless of your financial situation, that's why we're proud to have a minimum account size of just \$5,000.

LEARN MORE ABOUT
OUR UNBEATABLE PRICING.

[OUR PRICING \(PRICING.HTML\)](#)

BUILT AROUND **YOU**

WELCOME TO THE NEXT GENERATION OF **INVESTING.**

The Exceptional Portfolio brand was born, providing today's online investment management solution to serve investors with a unique, affordable, balance of human intelligence, care and experience over a push-button solution that thinks an algorithm can understand each individual's unique needs. A new era has begun allowing investors online access to investment management services. Technology improves efficiencies and affordability but it's not about artificial intelligence. Instead, it's about authentic knowledge. Sign up online or call us today.

BE **EXCEPTIONAL**

IT'S YOUR LIFE, **MAKE IT EXCEPTIONAL.**

If you have your own dreams, your own style, your own method, and march to the beat of a different drummer, then maybe we're just what you've been looking for. Why? Because we realize you're the exception, and not the rule. We invest in your future dreams. A new tradition for the exceptions of the world with new approaches that transform the ordinary into extraordinary. Together, let's reclaim your independence and make you the exception.

HOW TO **INVEST**

Simply answer a few questions that help us understand your investment goals. Choose your investment options and you will receive your customized portfolio. Your account will then be professionally managed by the Exceptional Portfolio management team. You become the exception.

WE OFFER **CHOICE**

All investors are not created equal. The Exceptional Portfolios offer you three style choices. Two are passive portfolios; one indexed to the broad market and one indexed to socially responsible investments. The third is an active portfolio that seeks to outperform the broad market. Once you choose, the portfolio is customized to your specific situation.

PORTFOLIO **MANAGEMENT**

The Exceptional Portfolio management team focuses on creating and monitoring diversified portfolios with a long term investment horizon. Portfolios that can weather market cycles based on your investment objectives.

TAX EFFICIENT **FOCUS**

We practice tax loss harvesting, a common practice that has been utilized in the wealth management industry for years. It allows you to minimize your tax liability by offsetting investment gains with investment losses.

401K-403(B) ROLLOVER **EXPERTISE**

We have worked for years coordinating 401k's- 403(b)'s into IRA Rollovers for our investors. Transferring all your old 401k's -403(b)'s from multiple employers simplifies your life.

EXCEPTIONAL **TEAM**

The Exceptional Portfolio management team combines 100 years of portfolio management and technology industry experience. Together we have been creating diversified portfolios for individuals and families for the last 14 years.

GET IN TOUCH

Are you interested in starting your Exceptional Portfolio journey? Do you have questions about the road ahead? We'd love to establish a dialogue with you about our proud portfolio management team and practices. Share your name, email, and topic of interest below to learn more about Exceptional Portfolio.

NAME

EMAIL

YOUR MESSAGE

SUBMIT



TAKE THE FIRST **STEP**

EMBARK ON YOUR INVESTMENT JOURNEY **TODAY**

Whether you're new to investing and portfolio management, or you've been managing your own assets for years, our team is dedicated to simplifying your financial life. We have a seasoned portfolio management team that utilizes today's technology to ensure that your portfolio is always ahead of the game and reflective of market changes.

What's more, we give you access to detailed information about every aspect of your financial ventures through our online client portal.

(<https://app.modestspark.com/inbound/exceptionalportfolio.com>) It's simple, user-friendly, and will always give the latest information on your portfolio.

GET STARTED ([HTTPS://APP.MODESTSPARK.COM/INBOUND/EXCEPT](https://app.modestspark.com/inbound/exceptionalportfolio.com)

([index.html](#))



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(<https://www.youtube.com/channel/UCTnVrIAKi025AnM8kQ2ewKw>) (<https://plus.google.com/u/0/b/115118667147056717972/115118667147056717972/about>)

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PORTFOLIOS (HOWITWORKS.HTML)

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EXCEPTIONAL PORTFOLIO PROVIDES INVESTMENT ADVISORY SERVICES THROUGH ITS AFFILIATION WITH CWC ADVISORS, LLC, A SEC REGISTERED INVESTMENT ADVISOR

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