



WE CAN NEVER DO TOO MUCH FOR OUR CLIENTS.

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**0%**  
Employee Owned

=

**0%**  
free to invest in client experience

FAMILY CFO CLIENT/ADVISOR RATIO

**0 TO 1**  
Moneta

**0 TO 1**  
Industry standard

ROBUST **0+** PERSON INFRASTRUCTURE TEAM  
- providing resources unavailable at small firms

Client Retent

MONETA A

**OBJECTIVE, UN**

**TRANSPARENT, FEE-0**

Close person  
**0+ DEDICATED**

**LEARN WHAT MONETA CAN DO FOR YOU**

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