

# INVESTMENTS THAT STAND THE TEST OF TIME

Evergreen Gavekal is an independent registered investment advisor (RIA) serving high-net-worth individuals, families, and endowments.

[CONTACT AN ADVISOR](#)

## WHAT SETS US APART



### INTEGRATED WEALTH PLANNING

Combining financial planning and custom portfolio management helps clients more effectively meet their financial goals.



### DYNAMIC INVESTMENT STRATEGIES

We don't just rebalance you, we seize market opportunities.



### ADVANCED DATA ANALYTICS

Our process allows us to analyze and measure changes in investor behavior.



### PROPRIETARY INSTITUTIONAL RESEARCH

Clients benefit from access to one of the industry's leading institutional research providers, used by prominent financial institutions in the world.

**\$2 BILLION AUM.**  
AS OF 12/31/2018  
**LET US GUIDE YOU.**

[OUR TEAM](#)

## EXPERIENCED WEALTH MANAGEMENT

Our sole pursuit is to act in the best interest of our clients. We invest capital based on the application of fundamental research, evidence-based principles, and risk management. We also believe in an integrated approach to wealth management.

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MOST FIRMS READ RESEARCH. WE WRITE IT.

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JOIN OVER 10,000 READERS. SIGN UP FOR OUR E-LETTER