VISION
Capital & Management

Invest Wisely.

Grow Purposefully.

Impact Strategically.

It is our great privilege to support a dynamic group of global people – representing a diverse set of visions for life, finances and philanthropy. We would enjoy exploring and hearing your story.

Request Consult

* To learn more about the professional history of our advisors/firm, please visit FINRA's BrokerCheck

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00 + Years

As Registered Investment Advisors, we have been entrusted to manage sizable investment portfolios, retirement plans and to collaborate on complex financial decisions. We aim for excellent performance, disciplined risk management, the highest fiduciary standards and creative solutions. Through our approach we aim to empower people with choices, knowledge and multiple analytical strategies for more freedom in investing.

000 M +

As Wealth managers our mission is to serve, support and encourage. We have assisted many clients as they have courageously started, built and sold businesses for an estimated $450m. We serve families & organizations who at their core have big vision and want to grow.

$000 M +

As Growth & Vision Consultants our drive is to be a champion, catalyst and a guide to help people uncover obstacles. We utilize our unique process called the Vision Wheel to

help people improve financial performance and decisions. We are grateful to have assisted clients in making planned and current gifts of $190m.

1

A Drive For

Investment Wisdom

1

Our experienced investment management team 25+yr avg tenure) consists of CFP's, CPA's, CFA's and MBA's who are passionate about collaboration and education and together deliver customized advice and ongoing wealth management. We seek to share expertise and financial wisdom for those we serve. We challenge conventional past-looking, passive investment processes and instead favor forward-thinking investment strategies that are distinctly designed and actively managed for each client situation.

Management has a history of relentlessly pursuing excellence through all market cycles. One way we do this is through our dynamic investment process which focuses on achieving optimal returns for each client's portfolio projected beta, primarily based upon the work of Jack Treynor. After passing away in 2016, the CFA Institute remarked, "Although the term 'beta' didn't arise until later, Treynor had nailed the theory of market value that incorporates risk premiums and helps objectively define and calibrate investment risk."

* All investing involves risk including the potential loss of principal. No investment strategy including buy and hold, diversification and actively managed can guarantee a profit or protect against loss in periods of declining values. Past performance is no guarantee of future results.

2

A Passion For

Growth with Purpose

2

Our wealth management team acts as a catalyst to overcome complex roadblocks to growth. We seek first to deeply understand and define each person's vision for "growth" in their lives- so

that that we may be a transparent, trusted and valuable advisor working toward goals together. Q5 We are reading that stages of growth that become a priority at different times.

VCM was founded in 1998 as an independent RIA to serve one family as their Chief Investment Officer. They helped navigate this family through the sale of their business, including business valuation, pricing, stock structuring and funds transfer.

Then as well as today they serve as their primary investment manager with the aim of providing consistent, sustainable, sustainable tax managed income. Through their visionary process they helped create a cohesive vision for their future and finances that included custom investment portfolio, annual retreats, gifts to family for education and a deeper connection to their community by building a major education center. Vision Capital & Management offers these services and many more.

3

A Culture For

Impact Investing & Giving

3

For our clients, alliances and teams, we seek to create value in every service we provide and inspire an enthusiastic giving generosity. We endeavor to achieve these aspirations while also enhancing the investment and wealth management process. Many people today are not content with investing like everyone else

they want to see positive things happening in the world through their investment choices- or avoid harmful ones. Some clients who seek to be strategic in their giving choose to actively integrate charitable planning into their wealth, investment and estate strategies which may help with tax and cash flow planning.

Services

Investment Management

Growth Consulting for Individuals & Business Owners

Comprehensive Wealth Management

Institutional Investing for Financial Advisors

Private Family Office

Philanthropic Consulting for

Mary J. Vogen

Founder, MS Organizational Development

A Founder's Vision

After working as a financial advisor for many years and serving hundreds of clients with vastly different wealth levels, I began to see a common thread, which if not identified, cared for and managed well- could be easily broken. Not all financial institutions and their advisors were trained or equipped to do this. And few people had a mentor team to help uncover this. This common thread that I identified in dynamic people who were enjoying growing with greater vision- was a comprehensive wealth & investment plan deeply rooted in their core vision, beliefs and values. It is my prayer that each person identifies, articulates and uses their core vision as a catalyst to drive their financial and life decisions. For over 21 years we've been walking this path along side our clients and continue to do so today with much excitement

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Start Your Wealth Journey

VISION
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First Name

Last Name

Email Address

Phone Number

Complimentary ways to see if we connect:

- [ ] Sign up for 30-minute group session: The Vision Wheel – Connecting Your Heart to Deep Cries of the World
- [ ] Schedule 20-minute Skype meeting with an Adviser and/or Request Risk/Return & Social Screen of Current Investment Portfolio ($2M minimum portfolio)
- [ ] Looking For Something Different

Anything else we should know?

Submit

Greater Vision

Contact Us

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108 S. Main Street, Suite B
Davidson, North Carolina 28036

VCM is an independent nationally Registered Investment Adviser with clients throughout the United States. Our main office is located on Main Street in the historic town of Davidson NC, across from Davidson College. This community of entrepreneurs, artists and educators inspires our passion for helping people achieve their vision through the highest standards in comprehensive wealth management.

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