



NESTEGG

GROUP

INVESTMENT ADVISORS



Nestegg builds investment portfolios for individuals who are growing a business, building a career, inheriting, or working through other life events. Often successful in their own fields, clients lack the time, interest, knowledge, or discipline for investing – so they delegate this important responsibility to us.

You also want an ally.





Where you, your family, and your friends can build portfolios.

An upbeat, welcoming place that treats you as an individual and as a competent,
intelligent adult.

A place to be released from worry. Nestegg helps free you from the burden of
navigating investments. You have greater gifts to share with your family, community,
and beyond – and have better things to do than read an investment prospectus at 11
o'clock on a Tuesday night.

Please read on for examples of who Nestegg serves.



Business Owners

from early-stage startup founders to seasoned entrepreneurs thinking about succession plans.

Recent College Graduates

seeking a solid foundation for their future.

Children, friends, and other family members of current clients

Pointing a loved one in the right money direction can make a lasting impact.





Bright Professionals

who cannot afford to waste precious time outside their core focus.

Widows or Widowers

rebuilding their lives and their finances.

Divorcees

forging a fresh path.

Inheritors

seeking wise ways to cultivate assets bestowed by previous generations.

Numerous studies have spoken: investors tend to leave large amounts of money on the table with their **investments**.* We say no more! You have worked too hard to drop the baton with this vital responsibility.

Nestegg endeavors to protect you, both from common portfolio mistakes and from exploitation by questionable investment schemes, because the investment choices you make today will have five, six, or even seven figure consequences down the road.

Meet the group who wants to help put you in a position of joy years from now, based on steps taken today.



When **Steve Goodman, President**, was a teenager, friends' parents would give him money to buy stereo equipment for their children. Parents knew Steve could be trusted completely to do the right thing. Later, family and friends sought his guidance on cars, homes, then investment portfolios. After graduating from Washington University in St. Louis in 1977 with a degree in business administration, he ran a pair of family businesses for over a decade before

degree in business administration, he ran a pair of family businesses for over a decade before founding The Nestegg Group in 1993 as a natural extension of his “not wanting to see family and friends ripped off.”



Jeff of **Investment Services**, joined shortly thereafter in 1994 and has been serving clients since then. His family moved from the Midwest to Mexico City for a year when he was a boy. Once his family’s household goods were shipped to the States, tools were no longer needed, so Jeff took them and sold them to local farmers, using the very limited Spanish he had at the time. Thus began a lifelong love affair with tools in any situation. Jeff graduated from DePaul University in 1990 with a Bachelor’s degree in Business Administration, then earned a master’s degree in theology from Harvard University in 1993. After joining Nestegg, Jeff worked at the Chicago Board of Trade.



Akiva Goodman, Investment Adviser Representative, joined Nestegg in 2015 after priming his ethical and analytical mind with a degree in Talmudic studies from Central Yeshiva Lubavitch of Brooklyn, followed by rabbinic ordination at Heichal Menachem in Melbourne, Australia. Living and studying in locations on four continents, Akiva honed his people skills and his ability to solve problems on the fly. A Series 65 licensed advisor, Akiva is also a master of spreadsheets and brings a strong dose of tech-savvy to the firm.



What can you expect?

We listen for what matters to you.

Have you ever been in a conversation in which there is a pause...and your partner finally reveals what's really on their mind? We foster such conversations—going beyond boilerplate questionnaires—to understand what truly matters, to build a portfolio based upon your values and concerns.

We use proven, tested tools and service providers.

Nestegg has assembled an array of behind-the-scenes tools and service providers, based upon our decades in the business. We vet a landscape of options—among custodians, investments options, software, compliance, and security—all to reinforce our fiduciary duty to clients.

We relish the details.

Does your to-do list seem to grow in the middle of the night? We know the feeling. Thus, we relish nailing your financial to-dos as soon as they arise.

We are free of agendas.

After helping many clients over the years, we have cultivated many strategies for approaching problems. However, no matter what challenges or issues you face, we approach them with an open mind and a willingness to dig deep for the solution that's best for you.

Simplicity.

This is how we see our job: to distill the seemingly overwhelming volume of investment options and information into simple points of action...with the goal of bringing more comfort to your investment life.

What philosophy guides us day-by-day?

Nestegg diversifies portfolios over a range of carefully vetted investments (beyond putting all your eggs in one basket).

You will find us suspicious of flavor-of-the-month investment fads. These momentary trends tend not to serve the best interests of our clients. Nestegg tries to be your firewall against bad ideas.

We are known for our discipline. Academic research has shown that much money is lost when investors veer from a plan, buying high and selling low, over and over. Nestegg maintains systems to help mitigate such risks to your valued assets.

Finally, from our earliest days we developed the habit of meeting face-to-face with our investment sources. We research investment options firsthand, posing the tough questions you would appreciate Nestegg asking.

What is the firm's background?

The Nestegg Group is a Registered Investment Advisor (RIA) registered with the SEC. As independent advisors, we are not beholden to any investment company or product, nor do we take commissions from any outside source—thus, we have the freedom and objectivity to put your best interests first.

We encourage you to look us up on the SEC's website to learn further details about our operations.

Nestegg has been located at the same address in Lincolnwood, Illinois, two minutes north of Chicago, since 1994. We think you are getting the picture: We try to be steady guys.

The Nestegg Group, Inc. has selected Charles Schwab & Co., Inc. as primary custodian for our clients' accounts. Schwab Advisor Services, which includes the custody, trading and support services of Charles Schwab & Co. Inc. ("Schwab"), is the leading provider of those services to independent investment advisors. Having Schwab act as custodian for client assets provides us access to a wide range of services that help us serve our clients.

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You need to feel comfortable with whomever you entrust to care for your nestegg. If you think we may be a good match for your needs, we would love to talk—there is no obligation, and we are happy to answer your questions.

Feel free to call us at **847-677-6378** or fill in the form below to schedule a free, no-obligation conversation.



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Disclosure