Creating Financial Peace of Mind

Forté Asset Management is a boutique wealth management firm that provides personalized financial advisory services to a select group of individuals and families.

Forté offers clients a unique, comprehensive solution to modern investment management by combining passive and active asset management – an optimum blend of science and cost. This style results in sophisticated investment management that is accessible, transparent and affordable.

Our clients quickly become aware of how appropriate guidance can result in measurable benefits through: increased efficiency, improved portfolio performance, reduced portfolio risk, better reporting, and significant cost savings.

OUR GOAL IS SIMPLE:

to make sure our clients feel confident and secure about their future by

-- creating financial peace of mind.

A Heritage of Independent Advice

Forté Asset Management was founded in 2004 in response to what we saw as a void within the investment advisory landscape. It is our belief that clients deserve better than the opaque, conflicted practices prevalent at most large brokerage firms, banks and trust companies.

We believe that the majority of investment advisors downplay or completely ignore proper asset allocation of portfolios. Forté offers clients a unique, comprehensive solution to modern investment management by combining passive and active asset management – an optimum blend of science and cost. This style results in sophisticated investment management that is accessible, transparent and affordable.

CORE PRINCIPLES

- Maintain complete independence
- Utilize highly-focused knowledge, experience and diligence
- Serve the unique needs of each client
- Strive to deliver value far exceeding our fees

Comprehensive and Integrated Services

Forté has the experience, skills and resources to offer our clients a breadth of services and solutions to meet their unique needs. We are not simply money managers. We are wealth managers who strive to add value to the overall well-being of our clients. In areas that require additional expertise, we introduce our clients to trusted specialists who supplement our advice. We serve as a single point of contact to ensure client financial decisions are well-integrated with their lifestyle decisions.

Investment Management

- Risk-appropriate asset allocation
- Securities selection
- Diversification
- Tax efficiency
- Income generation
- Re-balancing to target allocations
- Tax-loss harvesting
- Coordination with company retirement accounts

Support and Communication

- Regular meetings
- Quarterly performance reporting
- Market commentary emails

Education Planning

- 529 account advice
- Custodial account management

Retirement Planning

- Will I have enough to retire when I'm ready?
- Is my nest egg big enough to last the rest of my life?
- What is the best way to save for my children's education?
- I need to withdraw a set amount each month for living expenses. Should I take the money from my retirement or trust account?

Charitable Giving

- Charitable Remainder Trust (CRT) management
- Gifting of stock
- Family foundations
- Endowments

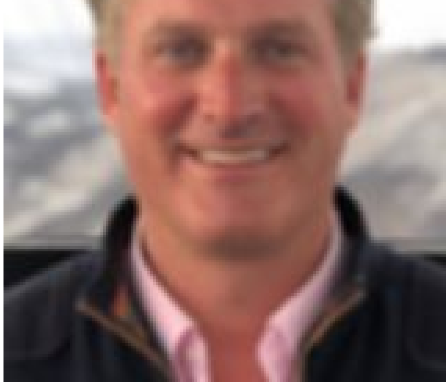
Consultation With Your Tax Professional

- Periodic review of tax brackets for appropriate investment selection
- Accurate maintenance of cost basis records
- Quarterly reporting for estimated taxes
- Estimation of capital gains for tax planning
- Review of custodian's 1099

Timothy I. Low

President

Tim is a twenty-five year veteran in the private wealth management industry. He partners with successful families to grow, manage, protect and transfer their assets. Working closely with his Forté colleagues and his clients' external advisors, he provides thoughtful investment wealth management solutions that integrate his clients' investment, philanthropic, estate and tax planning objectives.



Prior to joining Forté Asset Management, Tim was a Vice President in the Private Client Services division at Credit Suisse First Boston (CSFB) where he provided comprehensive wealth management solutions for individuals, families, and institutional clients. Previously, he was with Donaldson, Lufkin & Jenrette (DLJ), the predecessor to CSFB.

Tim received his Bachelor's degree in Economics with an emphasis in Finance from Hamilton College.

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Subject

Message

Send

from the adviser or any other investment professional.

Historical performance results for investment indexes and/or categories generally do not reflect the deduction of transaction and/or custodial charges or the deduction of an investment-management fee, the incurrence of which would have the effect of decreasing historical performance.