

Merion Capital LLC

Independent Financial Advisors

MERION CAPITAL LLC IS A FEE-ONLY, INDEPENDENT FINANCIAL ADVISOR. MERION CAPITAL LLC IS NOT OWNED BY NOR AFFILIATED WITH ANY SERVICE PROVIDER OR PRODUCT. OUR INDEPENDENCE AND EXPERTISE ALLOWS FOR OBJECTIVE, CRITICAL EVALUATION OF THE UNIVERSE OF PROVIDERS AND PRODUCTS SOLELY IN THE BEST INTEREST OF THE CLIENT.

INVESTMENT PHILOSOPHY

Merion Capital's investment philosophy embodies the following principles derived from academic research and the principles of modern finance:

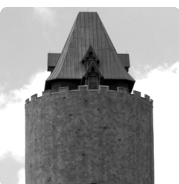
- Securities markets are generally efficient;
- There is a systematic relationship between risk and return;
- Asset allocation is the most important investment decision;
- Active management and market timing are not successful long-term investment strategies, and:
- Fees matter

> [INVESTMENT HANDBOOK \(/SITES/DEFAULT/FILES/HOMEPAGE-DOCUMENTS/INVESTMENTHANDBOOK_YE2012.PDF\)](/sites/default/files/homepage-documents/investmenthandbook_ye2012.pdf)

> [DIMENSIONS OF STOCK RETURNS \(/SITES/DEFAULT/FILES/HOMEPAGE-DOCUMENTS/DIMENSIONS_OF_STOCK_RETURNS.PDF\)](/sites/default/files/homepage-documents/dimensions_of_stock_returns.pdf)



FORM ADV PART II



This Brochure provides information about the qualifications and business practices of Merion Capital LLC. If you have any questions about the contents of this Brochure, please contact us at (269) 381-9635 and/or ccruppel@merioncapital.com. The information in this Brochure has not been approved or verified by the United States Securities and Exchange Commission or by any state securities authority.

> [FORM ADV PART II 2017 \(/SITES/DEFAULT/FILES/HOMEPAGE-DOCUMENTS/FORM%20ADV%20PART%20II%20BROCHURE%20AS%20OF%2020171231%20FINAL.PDF\)](#)

PRIVACY POLICY

Protecting the privacy and security of your personal financial information is important to us. As your financial advisor, you have entrusted us with the care of this information, and we understand your concerns about guarding your privacy. Your information is used by us to complete transactions that are requested by you or to enable us to transact on your behalf according to the instructions you have provided to us.

> [PRIVACY POLICY \(/SITES/DEFAULT/FILES/HOMEPAGE-DOCUMENTS/PRIVACY_POLICY.PDF\)](#)



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(<http://artemis-solutions.com>)