

# DELEGATE

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## WHAT DOES IT MEAN TO BE A DELEGATE?

Welcome to Delegate Advisors, an independent wealth advisory firm. Many things set Delegate apart, but the relationships we form with our clients make the biggest difference. Managing wealth is complicated, but we are here as your strategist, your investor, your trusted partner – every step of the way to simplify and clarify your financial life.

This is what it means to be a delegate. *Find out why we're different.*



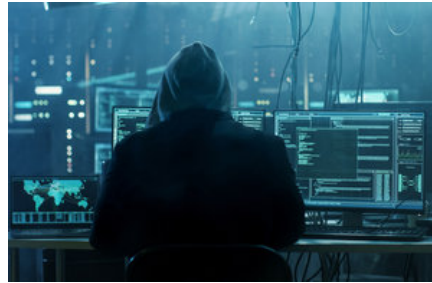
(/s/3Q2018\_Delegate\_r2.pdf)

## DELEGATE ADVISORS Q3 LETTER (/S/3Q2018\_DELEGATE\_R2.PDF)

In this letter, we discuss recent market volatility and look back a decade to reflect on the 2008-2009 global financial crisis. We review causes and effects of the crisis with an eye toward what Delegate has learned and how we have prepared clients for the next crisis.

*Read More >>*

(/s/3Q2018\_Delegate\_r2.pdf)



(http://delegateadvisors.com/news-insight-1/2017/7/25/heard-from-clients-5-8rczr-gjb6p)

## HOW DO I PROTECT MYSELF FROM SECURITY THREATS? (HTTP://DELEGATEADVISORS.COM/HEARDFROMCLIENTSLUNCHEON)

In an age where security breaches and cyberattacks dominate the headlines, personal security is a concern for everyone. The good news is that there are several simple steps you can take to keep your personal information and family safe.

*Read More >>*

(http://delegateadvisors.com/news-insight-1/2017/7/25/heard-from-clients-5-8rczr-gjb6p)



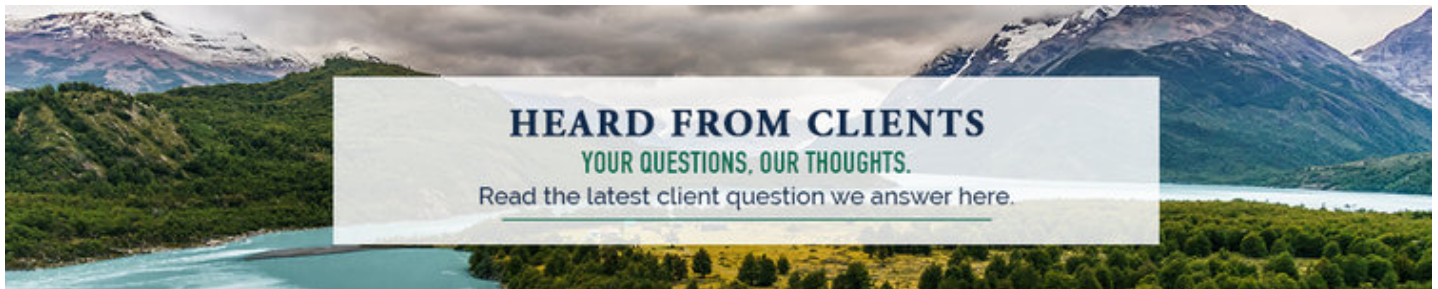
(http://delegateadvisors.com/news-insight-1/2019/6/25/delegate-advisors-largest-bay-area-wealth-management-firms)

## DELEGATE (HTTP://DELEGATEADVISORS.COM/NEWS-INSIGHT-1/2018/10/30/DELEGATE-ADVISORS-AWARD-FAMILY-WEALTH-ALLIANCE) NAMED AMONG LARGEST BAY AREA WEALTH MANAGEMENT FIRMS

We are pleased to announce that Delegate Advisors has once again been named on the Largest Bay Area Wealth Management Firms list by the San Francisco Business Times.

Read More >>

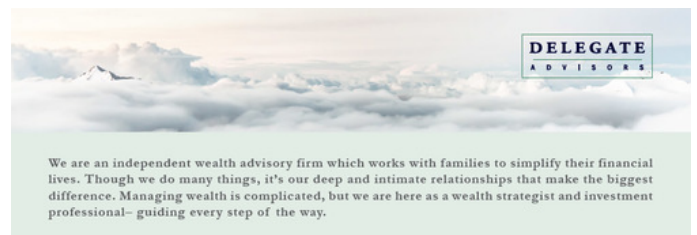
(<http://delegateadvisors.com/news-insight-1/2019/6/25/delegate-advisors-largest-bay-area-wealth-management-firms>)



(<http://www.delegateadvisors.com/home-page-feature/2017/3/31/heard-from-clients>)

## DELEGATE ADVISORS AT A GLANCE

What does it mean to be a Delegate? Simply put, we streamline your financial life. By working directly with you, or with your external financial providers, we focus on delivering independent wealth advice. We are different for several tangible reasons – find out more by viewing this overview.



### BOUTIQUE ADVISORY SERVICES PAIRED WITH INSTITUTIONAL QUALITY INVESTMENTS

Define client financial

Build macroeconomic

### A FEW FACTS AND HIGHLIGHTS ABOUT OUR FIRM

#### INDEPENDENT

Unaffiliated with banks, brokerages or managers

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SOUND INTERESTING? GIVE US A CALL TO FIND OUT  
MORE. 919.932.8400

## NEWS & INSIGHT

# San Francisco Chronicle



(/news-insight-1/2019/7/1/andy-hart-opportunity-zone-funds-san-francisco-chronicle)

**Andy Hart Discusses Opportunity Zone Funds with San Francisco Chronicle** (/news-insight-1/2019/7/1/andy-hart-opportunity-zone-funds-san-francisco-chronicle)

Read More → (/news-insight-1/2019/7/1/andy-hart-opportunity-zone-funds-san-francisco-chronicle)

JUL 1, 2019

(/news-insight-1/2019/6/26/recommended-readings-advisor-perspectives-us-economy-predictions)

**Recommended Readings from Advisor Perspectives: U.S. Economy Predictions** (/news-insight-1/2019/6/26/recommended-readings-advisor-perspectives-us-economy-predictions)

Read More → (/news-insight-1/2019/6/26/recommended-readings-advisor-perspectives-us-economy-predictions)

JUN 26, 2019





(/news-insight-1/2019/6/25/delegate-advisors-largest-bay-area-wealth-management-firms)

**Delegate Advisors Named Among Largest Bay Area Wealth Management Firms (/news-insight-1/2019/6/25/delegate-advisors-largest-bay-area-wealth-management-firms)**

Read More → (/news-insight-1/2019/6/25/delegate-advisors-largest-bay-area-wealth-management-firms)

JUN 25, 2019



(/news-insight-1/2019/6/11/andy-hart-climate-changes-impact-investment-strategies-marketcurrents)

**Andy Hart Discusses Climate Change's Impact on Investment Strategies with MarketCurrents (/news-insight-1/2019/6/11/andy-hart-climate-changes-impact-investment-strategies-marketcurrents)**

Read More → (/news-insight-1/2019/6/11/andy-hart-climate-changes-impact-investment-strategies-marketcurrents)

JUN 11, 2019

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