FinArc INVESTMENTS

(/services-solutions)

FinArc Investments designs custom investment plans for individuals, families, corporate retirement plans, and nonprofits.

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We are inspired by the foundational principles of architecture: Design a space that is structurally sound, artistically pleasing, and functionally efficient and effective. The great architects must be visionaries, yet grounded in today's reality. At FinArc, we think and act with a similar purpose: We thoughtfully design portfolios and financial plans that are stable, diversified, and enduring. Like architects, our team listens to our clients' needs, understands their dreams, creates a vision, develops a blueprint, and executes the plan. We provide our clients with the tools, knowledge and support to build a financial future that withstands the test of time.

SPECIALIZED EXPERTISE

FinArc serves a broad client base with varying interests, backgrounds, and investment goals. Our services and investment philosophy have proven to be particularly valuable for investors who identify as entrepreneurs, women investors, and sustainable investors.

(/specialized-expertise/#entrepreneurs)

ENTREPRENEURS (/SPECIALIZED-EXPERTISE/#ENTREPRENEURS)

Our collective knowledge and expertise make FinArc a strong partner for entrepreneurs. We understand that building a successful organization takes time, patience, and a willingness to endure the ebbs and flows every business will face. We are experienced in designing wealth plans that complement the entrepreneurial journey from business launch through exit.

The founder/CEO of a recruiting firm worked with FinArc and her tax adviser to establish a 401(k) plan to maximize her family's retirement savings and defer income taxes. When she was ready to transition away from the firm, FinArc connected her with exit planning experts to strategize and execute her exit from the business so that she could focus on her other priorities.

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WOMEN INVESTORS (/SPECIALIZED-EXPERTISE/#WOMEN-INVESTORS)

(/specialized-expertise/#women-investors)

Founded by a woman entrepreneur with a strong interest in advancing women in the workplace, FinArc has always been an appealing partner for woman investors. Our advisors understand women's investment goals and needs, and we are committed to helping women investors in the ways they prefer to be served.

FinArc provided financial guidance and support during and after a woman investor's divorce. Her highly personalized FinArc Financial Goal Plan gave her confidence that her financial goals, including the construction of a new home, were achievable.

(/specialized-expertise/#sustainable-investors)

SUSTAINABLE INVESTORS (/SPECIALIZED-EXPERTISE/#SUSTAINABLE-INVESTORS)

Today's investors are more aware than ever of the causes and organizations their dollars are supporting. Since FinArc's inception, we have worked with clients to carefully align their personal values and investment strategies without sacrificing potential market returns.

FinArc offers customized social screens to clients investing directly in stocks and bonds. Usually, sustainable investing issues are straightforward and FinArc invests based on standing instructions. Occasionally, investors should clarify their views. For example, some investors screen against owning weapons manufacturers. Clients with this screen had owned an IT outsourcing company which satisfied this screen initially. The company subsequently acquired a technology provider for military helicopters. FinArc reached out to the relevant clients, presented the development, and took action as instructed by each client.

To learn more about how FinArc's services and solutions can benefit investors in these categories, click here. (/specialized-expertise)

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PERSONALIZED PORTFOLIO MANAGEMENT

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Our goal is to build a plan for each of our clients that meets their needs and vision, remaining sensitive to their risk tolerance, return requirements and expectations, tax implications, and social screens when applicable. *Learn More* (/services-solutions)

> Design creates culture, culture shapes values, values help determine the future.

— Robert L. Peters, noted designer

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