



WE ARE **LYELL**

ABOUT US

OUR SERVICES





THE TEAM



TAX EFFICIENT, FEE-SENSITIVE INVESTING

Lyell Wealth is an active manager seeking long-term capital gains and income for our clients across different asset classes. Asset allocation is customized based on the client's circumstances as well as economic conditions and relative market valuations.

Lyell Wealth has a formal investment process whereby our Investment Committee determines which asset classes are attractive (or not) and which securities might be in client portfolios. The Investment Committee meets formally at least once weekly, but our research and dialogue around investing is continuous.

Lyell Wealth invests based on themes. A theme can lead us to an individual company, a particular sector, an asset class or a specific market. Investing in individual companies is preferred, as it eliminates a layer of fees. Many clients have sufficient wealth that Lyell can achieve diversification through investments in individual securities, and so individual securities often comprise a meaningful part of client portfolios. However, clients of all sizes may have funds or outside managers, when warranted, such as when market access, strategies, diversification or expertise justify the expense.

Taxes are a critical component of long-term returns. Individual security investing is tax-efficient through the ability to control the timing of capital gains as well as tax-loss harvesting. Lyell proactively considers how certain investments fit within a client's taxable and tax-deferred accounts (i.e. a higher dividend paying stock may be in an IRA, while a non-dividend stock is in the taxable account)

PERSPECTIVES



WHY LYELL?

Mt. Lyell is the highest mountain in Yosemite and can only be reached with considerable energy and sacrifice. Lyell's ice field, whose foundation is a glacier, represents the subtle juxtaposition of stability and change. The peak is named after Sir Charles Lyell, a geologist and

significant contributor to Charles Darwin's theories on evolution, including that the Earth was shaped by the same processes still in operation today.

Lyell is an apt name for our Firm. Achieving financial independence requires patience, determination and stamina. And it requires a guide that can help every step of the way as life, needs and objectives evolve. Lyell provides financial counsel and proactive investment management, so our clients can climb as far and as high as they aspire.



CONTACT US



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