



Live Simply. Invest Often. Give Freely.

We believe life is full of *Kairos* moments—the right, critical and opportune moments. We also believe you need a Kairos mindset to take advantage of these moments. This boils down to “*Live Simply. Invest Often. Give Freely.*”

As a financial advisor, we feel it's our mission to manage our clients' assets according a *Kairos* philosophy, and to help them achieve a *Kairos* outlook toward other areas of their lives as well.

We'd love to have you join us on this journey, even if you never become a client. Please keep reading to learn more.

(Don't forget about our **important disclosures** (/terms-conditions) later on this page. Thanks!)

LIVE SIMPLY



In our minds, simplicity represents freedom and helps us live a life in line with our values.

In our minds, simplicity represents freedom. It's a discipline that helps us live a life in line with our values. It helps us recognize the *Kairos* moments of our lives.

As part of our role as a financial advisor, we seek to provide resources to help you figure out what simplicity could look like for you--to help you identify your *Kairos* moments. For example, you might start by having a look at our **Method(ology)** (/method-ology) section. (We provide these resources online and free of charge, even if you're not one of our clients.)

INVEST OFTEN

To us, investment is the **preparation** for the *Kairos* moments of life—it's the steps you take to be ready before the moment appears. Alongside challenges toward simplicity, we've designed our **Method(ology)** (/method-ology) section to also provide ideas about how you can prepare (invest) for your *Kairos* moments.

When managing financial assets, we prepare for *Kairos* moments by:



To us, investment is the preparation for the Kairos moments of life—it's the steps you take to be ready before the moment appears

- Researching the fundamentals of investments and the U.S. economy [1]
- Evaluating current investment valuation
- Analyzing the technical indicators of specific securities

This preparation guides our **Foundation** (/foundation)(fundamentals) and **Managed Risk Equity** (/managed-risk-equity) (technical indicators) strategies.

GIVE FREELY



We believe Kairos moments are most powerful when shared with others.

We believe *Kairos* moments are most powerful when shared with others. That's why we see this as a journey we take together. To us, giving freely means you can give unencumbered--you can allow others to benefit from your *Kairos* moments.

We also believe one of the most rewarding experiences we can have is making a *Kairos* moment happen for someone else. We see charitable giving as a great way to have that type of impact—even for generations to come.

We offer **Donor Advised Funds (DAF)** (/donor-advised-funds) to give you new ways to support the charities you desire. When you open a DAF, the money you use to fund this account is considered a charitable donation for tax purposes. We'll manage the funds in this account, and after it is funded, you can direct all or part of the funds to the charities of your choice. You

can even choose to allow the balance to grow over time and use this fund as part of your legacy planning.

LEARN MORE ABOUT US

Now that you've read a little about our approach, you may have some more questions about who we are and the services we provide. Here are some places to start:

- Learn about **our history** (/about-us) and the services we provide.
(And, why we chose the name “Kairos”)
- Learn about **our custodian and fees** (/custodian-fees).
(We don't hold your financial assets, we just manage them)
- Learn more about our **Foundation** (/foundation) and **Managed Risk Equity** (/managed-risk-equity) strategies.
- Learn the steps to **discontinue our services** (/discontinuing-services)
(We'd hate to see you go...)
- **Request a copy** (/contact) of our disclosures document.
(This gives you more details about us and our services.)

Feel free to **contact us** (/contact) if you have any questions!

GET STARTED



Ready to jump in?

Ready to have us begin managing your financial assets according to the *Kairos* moment mindset?

GET STARTED (/TAKE-ACTION)

Notes:

[1] For us, fundamentals describe the underlying economic prospects of an investment as well as the economy's ability to provide a healthy environment for that investment. Technical indicator analysis, however, looks at the price movements of an investment in an attempt to forecast the investment's price trends.

[IMPORTANT: WEB SITE TERMS, CONDITIONS, AND DISCLOSURES \(/TERMS-CONDITIONS\)](#)

[PRIVACY POLICY \(/PRIVACY-POLICY\)](#)

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