WHAT WE OFFER

We intend to be our clients' primary trusted financial advisor, providing wealth management services by identifying their financial goals and risk profiles.

PORTFOLIO MANAGEMENT SERVICES UNDER THE WRAP FREE PROGRAM

We provide, under an all-inclusive management fee, wealth management services for investment accounts based on the client's investment objectives and risk profiles. Among other alternatives, we offer the following portfolios: Conservative, Moderate, Growth, and Growth Plus.

DISCRETIONARY PORTFOLIO MANAGEMENT

CONSULTING OR NON-DISCRETIONARY ADVISORY SERVICES

FINANCIAL PLANNING SERVICES (BEING DEVELOPED)

CONSOLIDATION SERVICES (BEING DEVELOPED)

OTHER SERVICES

TYPES OF PORTFOLIO MANAGEMENT

Conservative

s to preserve capital
n lower expected returns
volatility

Moderate

Aims to preserve capital with some degree of growth

Growth

Meant for clients willing to accept more volatility and expect higher returns

Growth Plus

Expects greater outperformance with high levels of volatility

EM Fixed Income

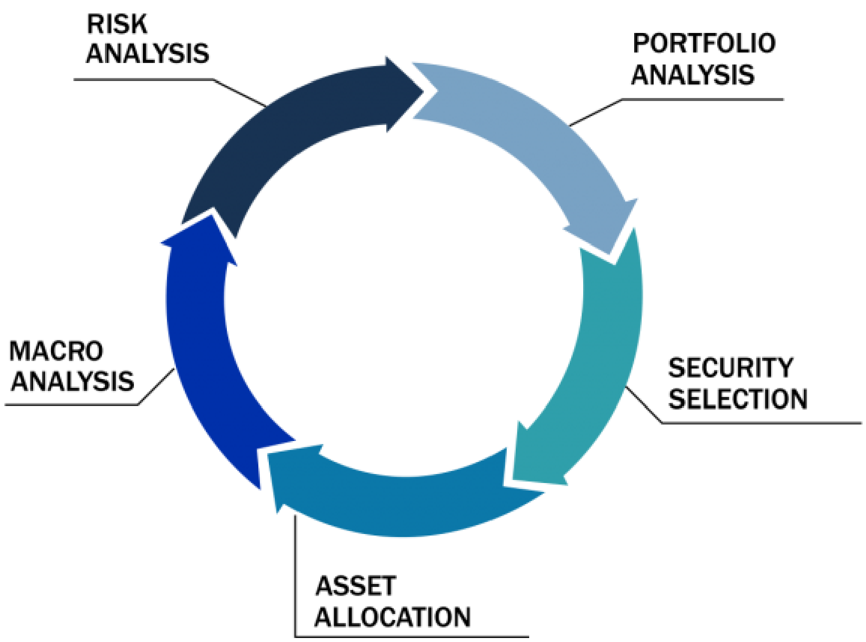
Mainly exposed to Emerging Markets debt securities. Aims to generate high income in a high volatility environment

HOW WE DO IT

r financial advisors will help our clients achieve their goals by ing our strategic approach:

- Jnderstand our clients' risk adjusted return objectives, to define suitable nvestments
- Develop a proper risk exposure management assessment, based on the pest practices and financial tools
- Attempt to reduce conflicts of interest, offering controlled fees, and an ndependent analysis and methodology
- Create a top-down tactical asset allocation incorporating our market putlook

INVESTMENT & RESEARCH PHILOSOPHY



ABOUT US

VISION

To be an independent financial advisory firm known for building strong, intragenerational, and transparent client relationships, as a result of our professionalism and in-depth knowledge of the markets and of each of our clients.

MISSION

To become the main trusted advisor to our clients and their families due to our knowledge, integrity, transparency and professionalism.

OBJECTIVE

Develop a successful and sustainable wealth management Family Office that provides reliable financial solutions and trusted advice to a selected group of relationships.

ADDED VALUE

/e would like to become our clients’ trusted advisor for individual, corporate and family wealth management. volution Wealth Advisors is an independent firm that strives to avoid conflicts of interest by choosing ualified custodians, providing proper execution and aligning our clients’ interests with ours. We offer dvisory services through the Wrap Fee program. This program provides discretionary asset management ervices for a convenient, single fee that includes account management, brokerage, clearing, custody and dministrative services.

OUR TEAM

OBERTO VAINRUB

SIDENT

folio manager and client advisor with over 25 years of experience in the financial industry. Ph.D. UCAB, Caracas; Stanford University; Industrial Engineer, UCAB, with a certification in Family Wealth Planning from the Family Institute. Roberto has taught at UCAB and IESA Business School in Caracas, in which he also served as ident and was the founder of its Entrepreneurship Center. Roberto has also lectured at the Rochester Institute echnology, Duke University, Florida International University and Miami University. Former Managing Director of M, Grupo Activalores, and former board member of Mercantil Commerbank Florida. Former member of the trage and Conciliation Committee of the Union Israelita de Caracas and the Pino Center Board of Florida national University. He is currently member of the board of directors of Mercantil Servicios Financieros, cantil Banco Universal, and director of Farmatodo Colombia and Spain. Roberto was born in Caracas, ezuela and has been living in the US since 2011.

CHAEL MARCIANO

EF INVESTMENT OFFICER

hael is an expert in portfolio analysis and mutual fund evaluation with vast experience working for investment sory firms in the industry. Prior to joining Evolution Wealth Advisors, Michael worked as a Research Analyst Portfolio Manager at Financial Partners Capital Management. He also worked in the Fixed Income Research artment at AV Securities. Michael holds a bachelor's degree in Business Management from Universidad ropolitana in Caracas, Venezuela.

CIANA RODITI

MPLIANCE OFFICER

ualified professional trained in Compliance, with experience in financial operations. Prior to joining Evolution lth Advisors, Luciana worked as Portfolio Assistant for Financial Partners Capital Management. During her er in Venezuela, she worked at Revlon Overseas Company and Avon. She holds a degree in Chemical neering from Universidad Simon Bolivar in Venezuela, and a MSc in Chemical Engineering from Technion Israel tute of Technology.

BORAH BARY DE COHEN

RATION ASSISTANT

orah is a graduate from The Universidad Central de Venezuela where she got a degree in Nutrition Science. She been involved for over 10 years with several organizations in fundraising and event planning for the benefit of community. She worked at the Family business as HR Manager. Prior to joining the firm, Deborah worked as a s associate advisor in an upscale department store.

ALIA SZKOLNIK

HNOLOGY AND MARKETING MANAGER

cent graduate who holds a Bachelor’s Degree from the University of Miami Business School with a double or in Business Technology and Marketing. Previously, Dalia has worked in Lennar’s International Department as siness Development Intern and gained experience in data analytics during an internship Signals Analytics ted in Netanya, Israel. Dalia graduated cum laude and was awarded the 2018 Most Outstanding Student in ness Technology Award.

VARO SUCRE

EARCH ANALYST

cent graduate who holds a Bachelor's Degree from The University of Florida with a major in Economics and a or in Business Administration. Alvaro previously interned as a Research Analyst in Activalores Sociedad and pleted a rotational program in Venezolano de Credito. Alvaro is a former member of the National Society lership and Success and attended the Cambridge International Consulting on Strategic Communication and lership. Alvaro was part of the Venezuelan Junior Golf Team and in 2009 he earned the National Championship

IA KARINA ARIAS

ENT ASSOCIATE

Karina is a graduate from Nova Southeastern University in Miami, where she obtained her bachelor's degree in ness Management. Prior to joining the firm, Ana Karina worked at Merrill Lynch as a Client Associate and sted a team of financial advisors in daily operations. She is also a Real Estate agent and specializes in the mi market.

CONTACT US

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