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INVESTING MADE EASY.

The Nest Egg experience is designed to be easy. Whether you are saving for retirement or looking to accomplish any other financial goal, Nest Egg is here to help. As a planning based platform, Nest Egg will continuously monitor your portfolio to keep you aligned with your goals and objectives.



Get Started

The first step to securing your financial future is searching for your bank below.

We work closely with many local banks to deliver the Nest Egg experience to their clients. Branch representatives can guide you through the risk questionnaire and provide helpful literature on the Nest Egg platform. Please search for your preferred financial institution below to get started.

Search

What's your Nest Egg number?

The Nest Egg approach to investing is based on a Monte Carlo™ simulation that calculates the probability of reaching your financial goals. Using your answers to a short series of questions, Nest Egg is able to determine your risk-tolerance level and assign you a corresponding Nest Egg number. This number, combined with your investment objective, enables Nest Egg to create a comprehensive investment plan and assist you in achieving your financial goals.



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Set your goals.
Build your portfolio.
See if your Nest Egg can grow.

The Nest Egg experience is designed to be simple. We help create an investment plan for any of life's situations: Retirement, building a house, saving for college or even just growing and building your wealth. We manage your Nest Egg so you can focus on everything else life has to offer.

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Nest Egg is a Registered Investment Advisor with the SEC. A copy of the firm's ADV is available upon request. This statement should not be relied on as a substitute for official account statements. Investments on this page are subject to market risk, including the possible loss of principal. It should be assumed that investments listed on this page are not FDIC insured. The value of the portfolio will fluctuate with the value of the underlying securities. Investors should consider an investment's investment objective, risks, charges, and expenses carefully before investing.



Investing made easy.



goals.

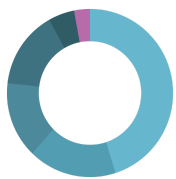
- **Ongoing Management:** Nest Egg will monitor your account and rebalance quarterly to keep your portfolio aligned with your financial goals. If Nest Egg sees you are falling short of your goals, we will recommend additional contributions.

Explore Our Nest Egg Portfolios

Ultra Conservative



The conservative model focuses on earning steady interest all while preserving capital. This is achieved by allocating a relatively small position in higher risk asset classes and concurrently keeping a majority of the positions in assets expected to have minimal volatility. The return potential will remain relatively minimal commensurate with risk.

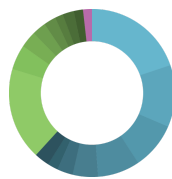


Equities	0%
Fixed Income	99%
Alternative	0%
Cash	1%

Conservative



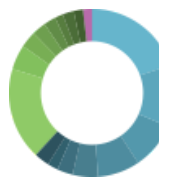
The conservative model focuses on earning steady interest all while preserving capital. This is achieved by allocating a relatively small position in higher risk asset classes and concurrently keeping a majority of the positions in assets expected to have minimal volatility. The return potential will remain relatively minimal commensurate with risk.



Equities	5%
Fixed Income	88%
Alternative	6%
Cash	1%

Low Risk

The low risk model focuses on earning steady interest all while preserving capital. This is achieved by allocating a relatively small position in higher risk asset classes and concurrently keeping a majority of the positions in assets expected to have minimal volatility. The return potential will remain relatively minimal commensurate with risk.



Meet Our Team



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Michael Church



Michael J. Durette



Jennifer Laster, CPA



Charles Scavone IV



Hussein Jaber



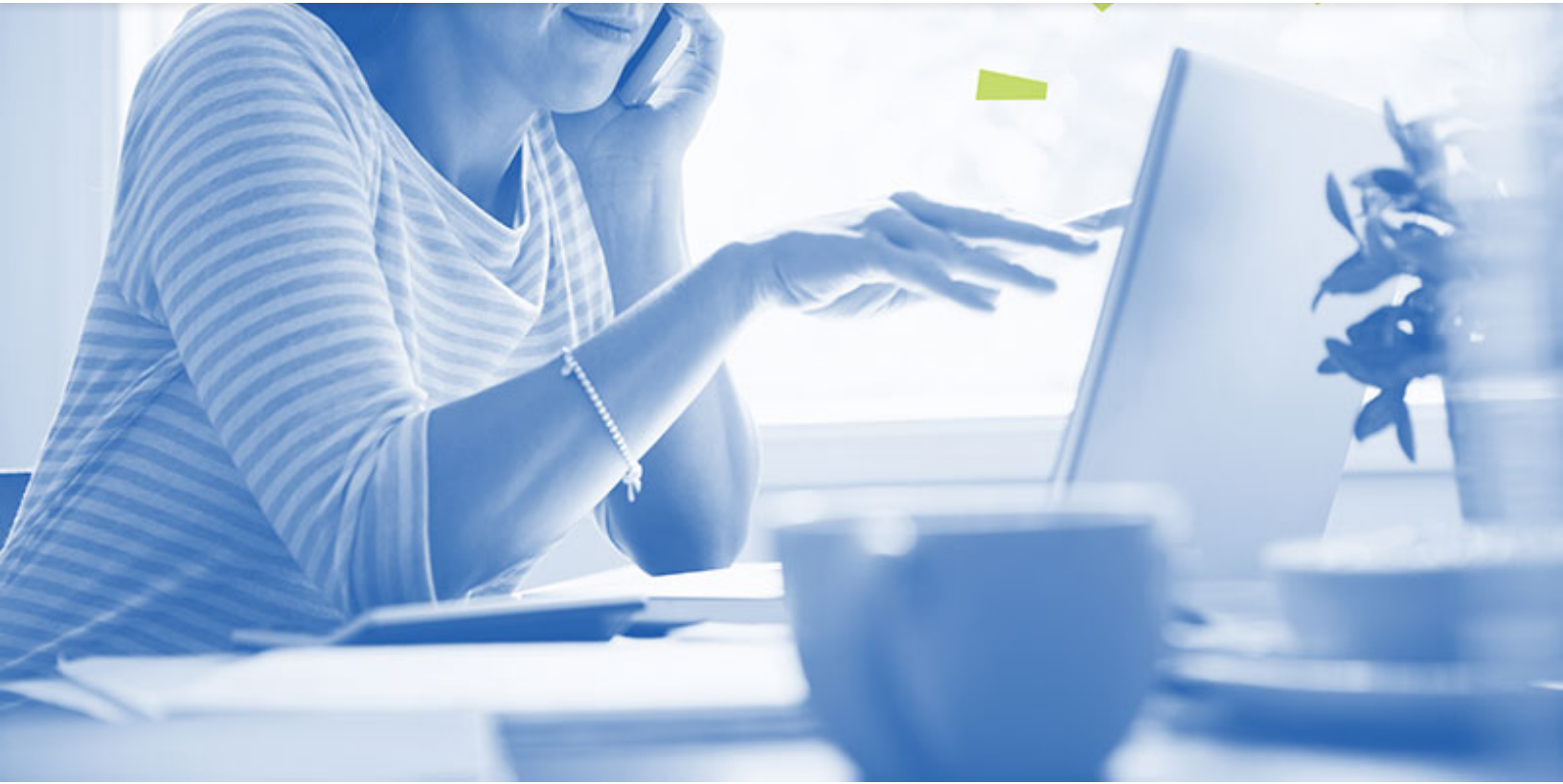
Daniel Parker

Meet the Team



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Speak with a Nest Egg representative.

Have more questions? We are here to help! Part of making investing easy is providing you with the guidance necessary to keep you aligned with your financial goals. Simply schedule a consultation to take the next step toward securing your financial future.

[Schedule a Consultation](#)

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