

As the goals of individuals, multi-generational families and institutional investors vary widely, Weaver Capital Advisors is dedicated to providing tailored investment strategies that align with each unique financial objective. No matter the market condition, Weaver Capital Advisors can empower your financial future with experienced guidance and a commitment to excellence.

WHY WEAVER CAPITAL ADVISORS?

Weaver Capital Advisors offers customized wealth management strategies that meet our clients' goals. Our focus is on your current and future needs as well as your portfolio construction to complement your risk tolerance and cash flow needs. We build a relationship with you by listening carefully, understanding your needs and developing a personal plan. Our vast experience and knowledge, combined with access to financial solutions that best fit your needs, enable us to grow your wealth the way you want. With the relationship as the foundation, we build and implement a strategy that grows and protects your assets in order to bring you peace of mind.

INVESTMENTS

- ▶ Fixed income
- ▶ Individual equities
- ▶ Mutual funds
- ▶ Exchange-traded fund (ETF)

FINANCIAL PLANNING

- ▶ Estate, gift and trust planning
- ▶ Retirement income planning
- ▶ Private foundation
- ▶ Risk assessment

ALTERNATIVE INVESTMENTS

- ▶ Private debt
- ▶ Private equity
- ▶ Real estate
- ▶ Hedge funds
- ▶ Structured products

RETIREMENT AND COLLEGE PLANNING

- ▶ 401(k)
- ▶ Solo 401(k)
- ▶ Defined benefit plans
- ▶ 403(b)
- ▶ SEP IRA
- ▶ Simple IRA
- ▶ Education savings account
 - ▶ 529 college savings plans
 - ▶ Custodial accounts

WEAVER INSURANCE SOLUTIONS

- ▶ Long-term care
- ▶ Life insurance solutions
 - ▶ Term life
 - ▶ Whole life and/or universal life products
 - ▶ Variable life
- ▶ Annuity

CASH MANAGEMENT

- ▶ Check writing
- ▶ Credit cards
- ▶ Asset backed loans

ABOUT WEAVER

Weaver, the parent company of Weaver Capital Advisors, is well known and respected for its quality, comprehensive approach to serving its clients, and in its 70+ year history has built a reputation of exceeding clients' expectations. In addition to traditional assurance and tax services, Weaver provides clients with an array of consulting services, including risk advisory, transaction advisory, IT advisory, valuation, forensics and litigation, energy compliance, digital transformation and automation and much more.

KEY CONTACTS:

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