EMERALD™
ASSET ADVISORS, LLC

Investment Strategists for Successful Families


Our clients are
our greatest
asset

EMERALD
ASSET ADVISORS, LLC

Let us guide you into the future

Scot Hunter
Founder and CEO

Emerald Asset Advisors is a Registered Investment Advisor with The Securities and Exchange Commission and was founded in 1998. Our clients include affluent families, foundations and institutional investors.

For more than a decade, our mission has been to help our clients achieve their financial and life goals. The investment landscape is becoming increasingly complex. Let us be your guide by providing informed advice and portfolios customized to your objectives.

Our investment advice is based on understanding your vision for the future. We want to know you and we want to build a lifelong relationship based on trust and insightful financial guidance.

We have a seasoned team of professionals who are focused on meeting your financial goals. We have a full complement of resources in our tool kit; including access to other money managers with expertise in niche areas, specialists in equity investing and a comprehensive array of investment products.

We understand that our success is completely dependent on your satisfaction and confidence in us. That's why we are committed at every level of the firm to deliver our clients consistent service and advice of the highest quality, competence and integrity.

We believe all great companies find innovative ways to meet the needs of their clients. Sometimes solving a problem just takes someone who can make the right connections. We work hard to put people together who can help each other both professionally and personally through our extensive network of clients, business partners and friends of the firm.

Our investment philosophy:

We believe that preserving what you have and avoiding the big losses is more important than investing beyond your risk tolerance.

We think investing aggressively is not necessary to generate solid long-term returns. Our goal is to manage your portfolio with consistent growth but without the volatility that typically accompanies a traditional stock and bond portfolio.

Our
approach

We consider asset allocation to be the foundation of any client's long-term strategy. We believe our approach is different in that we provide an alternative to the conventional portfolio mix of stocks and bonds. We are flexible in the types of investment sub-styles and strategies we pursue (including the use of short positions) and we believe it enhances our ability to be nimble and capitalize on changing market conditions. Finally, we believe in liquidity and transparency. We choose investments that allow us to move in and out of the market when needed.

We apply a consistent approach that includes the following key investment principles:

- **Be flexible in our investment approach**
- **Be adaptive to changes in the global economy and markets**
- **Be opportunistic but not aggressive**
- **Avoid "style box" thinking in portfolio construction**
- **Find bull markets wherever they may exist (via long or short investments)**
- **Capture as much of the market's upside and as little of the downside as possible**
- **Keep losses short in duration and shallow in magnitude**

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Personalized Wealth
Management Services

As your wealth management advisors, we look at the big picture as well as the details, and use the following techniques to craft your personal investment plan:

Advisory Services

- Highly Personalized Service Provided by a Multi-Disciplined Team
- Greater Flexibility and Choice Among Investment Options and a Higher Degree of Customization
- Sophisticated Account Analysis
- Consolidated Performance Reporting – Including Investments Held Elsewhere
- Coordination of Retirement, Estate and Tax Planning with CPAs, Attorneys & Insurance Providers
- Family Meetings and Educational Workshops

Investment Management

- Diversified Investment Portfolios
- Asset Allocation
- Equity Investing
- Fixed Income Investing
- Alternative Investment Strategies
- Third Party Investment Managers
- Fee Only

Our team analyzes your current financial situation and helps you quantify your goals for the future. We know as time goes on your investment plan will change as your life changes, and we will meet regularly to review your evolving needs.

We continually communicate our thoughts to you on topics ranging from our economic and market outlook to our investment philosophy and strategy. Your portfolio is custom-tailored from diversified investment options that are the result of research performed by our Investment Committee.


Our
Values:
• Trust
• Integrity
• Responsiveness
• Quality
• Effectiveness

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Your experience

We want you to enjoy and focus on your family, business and personal goals. It's our job to keep abreast of new developments in the markets, monitor your investments and to keep you informed when changes are needed.

Understanding your financial situation, including short and long term goals

Creating and Managing a diversified investment portfolio

Selecting investment managers in each investment category

Providing consistent monitoring and review of progress towards achieving your goals

Communicating on a scheduled and as needed basis to review progress and synchronize your plan with new information

Client events

Every year we host educational workshops and an array of social gatherings. These events allow us to get to know you outside the office.

We believe these events will give you the opportunity to meet other individuals who may have similar business interests and/or hobbies. These events have enabled us to cultivate stronger long-term relationships, and we hope they will do the same for you.

Open Houses

Informative Forums

Wines of the World

Golf Workshops

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Our Commitment to you

Emerald Asset Advisors offers resources found in a larger firm, while giving you the personalized attention expected from a smaller firm. Our staff is dedicated to managing your assets with great care, being conscientious of your goals, needs and risk tolerance. We want to provide an exceptional investment experience where you are an active participant in building your investment plan.

Our goal is to make you feel confident and secure in your financial future.

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