WEATHERLY
ASSET MANAGEMENT

HELPING TO SUSTAIN YOUR LEGACY THROUGH STRATEGIC FINANCIAL ADVICE AND PLANNING

WELCOME TO WEATHERLY

As an independent, fee-only registered investment advisory firm, Weatherly's team of experts offer a range of solutions through a spectrum of financial services unique to our clients and their personal financial goals.

WHAT TO EXPECT AS A CLIENT

- OPEN DIALOGUE
- A PERSONALIZED APPROACH
- A DEDICATED TEAM
- EDUCATION
- EFFICIENCY
- SECURITY

ABOUT THE FIRM

Weatherly Asset Management, L.P. is a Registered Investment Advisor, located in Del Mar, California, dedicated to providing high quality, holistic and innovative wealth management services to high net worth individuals, small businesses and institutional clients since inception of the Firm in 1994.

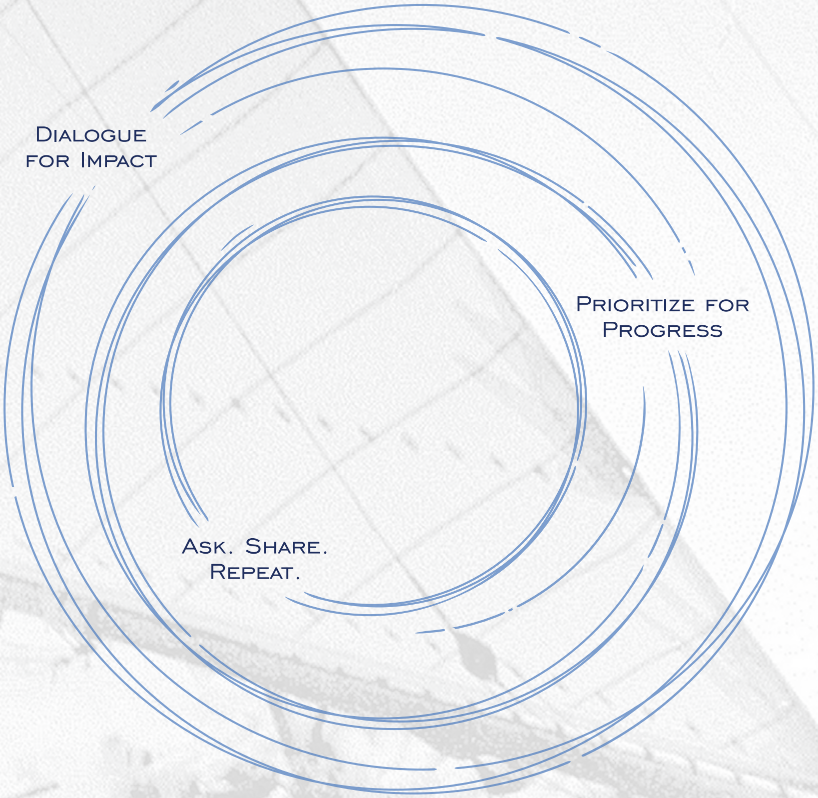
Our comprehensive approach to all aspects of a client's financial life, the extensive experience of our principals, and the accessibility of experts, set us apart from other firms.

Our primary business focus is money management, with each account individually managed to maximize wealth preservation and growth over time. We also provide advice related to retirement planning, tax planning, philanthropic planning, financial planning and college planning, as well as estate planning and wealth transfer guidance. Our goal is to provide clients with as much information as necessary to effectively manage portfolios and help achieve their financial goals.

Weatherly Asset Management, L.P. is the investment advisory division of Weatherly Asset Management, Inc. As an independent partnership, the Firm is wholly owned and operated by the partnership.

THE RIPPLE EFFECT

At Weatherly, we welcome you to a planning model in which you can drop your stone of inquiry, and relax as together we explore The Ripple Effect. While the impetus for our first meeting may be a particular challenge or opportunity, the real impact of our work comes from navigating the interconnected nature of life and livelihood.



Together, we explore outliers of opportunity, solving problems and maximizing your potential in unexpected ways. Conversations become a series of concentric circles. Each one influences the next, impacting areas not appearing connected to wealth or planning.

We seek to create The Ripple Effect with every individual we serve: we impact you so that you can impact your family, company and community in the manner to which you aspire.

CREATING AN OASIS OF CALM THROUGH EDUCATION AND UNDERSTANDING

OUR SERVICES

Critical to the success of an investment strategy are the original framework and ongoing design provided by your investment manager for your individual investment needs.

CUSTOMIZED, TAX-EFFICIENT PORTFOLIOS

Portfolios are developed to create and maximize after-tax, after-fee returns for each client. With current emphasis on short-term performance results, many investors overlook the importance of long-term wealth accumulation, a critical factor being after-tax returns.

FINANCIAL, FAMILY, & BUSINESS PLANNING

We strive to make an impact in a number of ways at Weatherly – there is an inseparable connection between how much we learn about clients and the relevance of our advice. Creating a financial plan is an important component and serves as a roadmap to success.

PHILANTHROPIC STRATEGIES

Philanthropy is a core pillar in Weatherly’s business model – in both the advice that we are providing to clients and the actions that we are taking as a team both in and out of the office. Over the years, we’ve cultivated an intimate environment in which both our clients and communities matter.

WEALTH & ESTATE GUIDANCE

Comprehensive financial advice is not complete without discussing wealth and estate planning. Our team has a high level of experience working with clients on a multitude of estate issues relating to significant life events or changes in current law.

CLIENT DIALOG & EDUCATION

Our client base is critical to our mutual success and we see a direct correlation between the service drivers of our Firm and the value clients derive from our planning. Our goal is to provide clients with as much information as they find desirable but also necessary for us to effectively manage their portfolio.

WHO WE WORK WITH

WE'RE PROUD TO WORK WITH A DIVERSE GROUP OF SUCCESSFUL BUSINESS OWNERS AND PROFESSIONALS

ENTREPRENEURS AND SMALL BUSINESS OWNERS

Get the financial guidance you need while working hard to build your business from the ground up.

For business owners we often provide:

- Corporate structure review
- 401(k)s establishment
- Retirement planning to maximize income and returns
- Advice for transitioning or selling a business

WORKING WEALTHY

Focus on your profession and business while having confidence in their financial matters by delegating wealth management to our team of experts.

For working wealthy clients we often provide:

- Asset protection
- Estate planning
- Family dynamics surrounding wealth transfer to the next generation

WOMEN

Women are living longer than men, holding more college degrees and starting businesses at a greater rate; becoming more prominent forces in wealth.

As a firm majority owned by women, we work with a number of female business owners and professionals as well as those in transition through death or divorce.

WEATHERLY ASSET MANAGEMENT
WWW.WEATHERLYASSETMGT.COM

832 CAMINO DEL MAR, SUITE 4
DEL MAR, CA 92014

PHONE
(858) 259-4507

FAX
(858) 259-0782