

## CONTACT INFORMATION

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# ELYSIEN

PRIVATE WEALTH & REAL PROPERTY

Phone: (702) 375-7733 Web: Elysien.com

## Comprehensive Wealth Management Solutions

### OUR CLIENTS

Our clients are affluent business owners, corporate executives, individuals, and foundations who expect accountability and efficiency with their wealth management needs. We specialize in providing our clients a comprehensive, holistic approach to wealth management that is client-centered and provides independent, innovative solutions and results.

### OUR APPROACH

We utilize both active and passive management programs that incorporate strategic and tactical asset allocation models. We will utilize various investments including equity and debt instruments, cash, REITs, alternative investments, hedge funds, commodities, and derivatives - all designed around our clients' goals, risk tolerance, and expectations. We do not own any proprietary products, nor do we take compensation from sources other than our clients. You can always feel confident that the advice we provide is completely independent and in your best interests.

### OUR INDEPENDENCE

Elysien Private Wealth is a fee-only Registered Investment Advisor in the state of Nevada. We maintain a fiduciary duty and do not accept compensation from parties other than our clients.\* This allows us to be guardians of our clients assets, an oath that we take seriously and administer with pride.

## BIG ENOUGH TO DELIVER. SMALL ENOUGH TO CARE.

Elysien Private Wealth is dedicated to serving our clients with conflict-free, independent advice. We do not accept commissions or any other form of compensation from parties other than our clients. We can guarantee sound investment management and financial planning services for all of our clients.

### FEE-ONLY INVESTMENT MANAGEMENT

We take a balanced approach to wealth management that focuses on both investment results and financial security. We believe that wealth preservation & stewardship play a role to investment results & performance.

### FEE-ONLY LENDING

We provide fee-only lending services for mortgages, commercial properties, securities, small businesses, and specialty lending - all without conflicts of interest or proprietary products.

### FEE-ONLY REAL ESTATE

Our innovative real estate advisory account allows us to service your residential, land, industrial, or commercial real estate needs in Nevada or throughout the country.\*

### PRIVATE BANKING & CASH MANAGEMENT

We provide short- and long-term cash management solutions for individuals, businesses, and foundations, designed to meet the complicated cash management needs of affluent individuals and institutions.

### FEE-BASED INSURANCE

Our fee-based insurance platform allows us to find and execute comprehensive and complicated risk management solutions for individuals and institutions. Our programs are designed to take most or all of the commission out of the process, allowing us to find conflict-free models that save you time and money.\*

### TAX PLANNING AND PREPARATION

All of our qualified clients have access to our tax planning specialists who will assist you with personal and corporate tax preparation and filing services as well as consulting services and investment taxation issues.

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## Comprehensive Wealth Management Solutions

### ESTATE PLANNING AND TRUST SERVICES

Our comprehensive group of estate planning professionals assist us with incorporating your estate plan and legacy planning with your overall wealth management portfolio. We provide trust services and administration, as well as trust taxation and estate planning projects.

### CHARITABLE GIFTING AND PHILANTHROPY

Our dedicated charitable gifting team can help your endowment, business, foundation, or personal legacy plan with targeting worthwhile charitable endeavors, administration, and taxation issues, as well as wealth management and family governance assistance.

### EFFICIENCY AND TECHNOLOGY

Imagine a company that allows you to see your entire financial picture at one place and in real time, from anywhere in the world. At Elysien Private Wealth, our innovative technology platform allows individuals, endowments, foundations, and businesses to access all of their accounts, whether we are managing them or not at any point with real time balances and performance updates. Through our firm you can manage cash, investments, loans, and insurance - all at one place through your secure vault. Your vault will also allow you to store important documents and personal items like wills, passports, corporate filings, and tax records - all available to you 24 hours a day, 7 days a week through our secure and encrypted web site.

### LOSS MITIGATION SERVICES

Through our Lending Advisory Account, our dedicated team of lending professionals manage, process, and develop comprehensive forensic loan auditing and modification programs for commercial real estate owners and administrators. Our programs are designed to assist commercial real estate owners with increasing yields and minimizing expenses on these assets.

### RETIREMENT AND ADVANCED PLANNING

Our wealth management team specializes in assisting executives and small business owners with company and personal retirement plan administration and implementation, as well as complex restricted stock, and concentrated stock position planning. We can facilitate an integrated benefits plan for your firm, including executive compensation and deferred compensation planning, while maintaining our fiduciary duty to you and allowing you more time to run your business the way you see fit.

**CONTACT US TODAY TO LEARN MORE ABOUT PARTNERING WITH ELYSIEN PRIVATE WEALTH.**

Elysien private Wealth is a Registered Investment Advisor in the state of Nevada. This brochure should not be considered a solicitation for investments or any other financial planning services or products. Elysien private Wealth withholds the right to amend or alter any of these programs at anytime without notice. Some of the services listed above may be provided through our partner firms and/or affiliates.

\*Elysien Private Wealth may provide some insurance and real estate products or services that may include commissions. These relationships are fully disclosed to clients and only utilized when a "fee only" alternative is not available for the required product or service.