We take the worry out of **investing**.

CLARIS
ADVISORS
UNDERSTAND • INVEST • RELAX

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How we see it.

At Claris Advisors, we're redefining the investor experience. And it all starts with a type of wealth management where you are at the center of everything we do.

We take a distinctly different approach to investing. Driven by academic research, our investments are designed to capture the long-term incentive of financial markets. Why? Because decisions based on evidence and fact are far better suited for helping you achieve your goals than the opinions of the talking heads and Wall Street hype.

Further, we're fiduciaries. That means we have a legal obligation to act with your best interests in mind. We measure everything we do against how it helps you, our client, achieve your specific goals.

So that's where we start – helping you determine where you are, and where you want to go. Once we have a clear sense of your goals, we'll provide you with a comprehensive Investment Policy Statement tailored to your needs and anchored in our wisdom.

OUR METHOD IS SIMPLE:

UNDERSTAND. INVEST. RELAX.

Understand how capital markets work for you.

What's your strategy?

Many try to beat the market with shaky predictions of the future. **Not us.** Those types of investments, although exciting, tend to be costly and full of setbacks.

Our approach will help you gain **greater control** over things like risk, costs and taxes. Studies have shown that when the market declines in value, many investors get fearful and sell. Similarly, when the market increases in value, investors get overeager and buy. We believe there's a better way.

With Claris, you'll understand:

- There's more to your financial goals than the immediate rate of return.
- Focusing on rational decisions is more important than focusing on outcomes.
- Investing done right is not exciting or entertaining; it's like watching grass grow

Claris can help distill the market noise for you and get you focused on what matters: A strong investment plan, accurate risk assessments, and clear guidelines for achieving your goals.

Invest in a methodology grounded in decades of academic research.

The foundation of what our **investment strategy** is based on began in 1952 when Harry Markowitz penned a paper named Portfolio Selection. Since then, support for this evidence based methodology has only grown. And after decades of independent academic research, we now have the fundamental principles of what we believe is prudent investing.

Markets are efficient. New information is incorporated into stock prices so fast, it's extremely difficult to profit in reaction to unfolding news; especially after considering the costs involved.

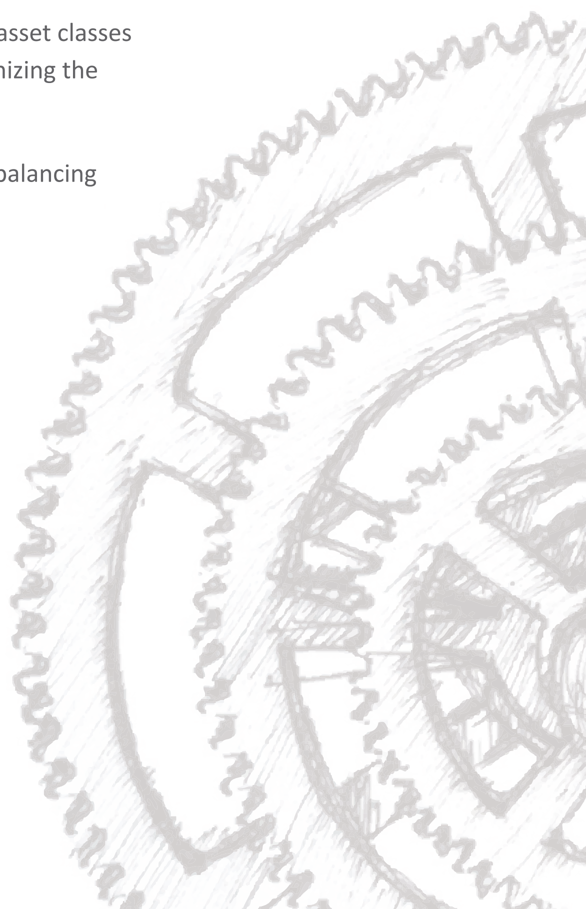
Risk and expected return are related. Riskier asset classes provide higher expected returns as compensation for accepting greater levels of risk.

Diversification works. Spreading your risk among multiple, distinct asset classes helps you capture your desired level of expected return while minimizing the risks involved.

Rebalancing is essential. Regular portfolio maintenance through rebalancing helps ensure that you buy low and sell high.

We're so confident in our method, we invest our personal assets based on the same set of academic and prudent principals as we advise our clients. We can proudly say,

"We invest your money as if it were our own."



Relax and spend time on what matters most to you.

At Claris, we believe in the power of the market, and when your plan is rooted in science, you can relax and focus on the things that matter most to you.

Here’s how we do it.

Fiduciary care. Often referred to as the highest legal duty one can assume on a client’s behalf, we are legally bound to serving only your best interests. And we gladly do so.

Transparency. All important information, including costs and potential conflicts of interest, will be clearly explained and disclosed to you.

Prudent investment solutions. Your investment strategy will be rooted in evidence based strategies and academic research. We ignore the hype of Wall Street and invest your money like it’s our own.

Objectivity. You pay us directly in a fee-only arrangement, based on a percentage of the assets we manage for you. We don’t receive commissions of any kind for our investment management services that might hinder our ability to provide you with sound advice. We believe this to be consistent with our investment strategy and commitment to a fiduciary standard of care.

THE BAM ALLIANCE®

The BAM Alliance

Claris is proud to be a co-founder and independent member of the BAM ALLIANCE.

The BAM ALLIANCE is built for you. We’re a community of investors and advisors who’ve discovered a better way to help clients take control of their financial futures. Our membership in the BAM ALLIANCE means you get access to a nationwide network of expertise, tools and ongoing education to help you accomplish your most important goals.

We are united by the promise that the decisions we make today will serve both your near- and long-term goals and interests.

Are you ready to understand, invest, and relax?
Call us today to get started.

Learn more at **www.claris-advisors.com** or call **(314) 655-5504**

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