AVITAS

YOUR ADVISOR FOR LIFE.

Avitas is growing and looking for a talented wealth manager to join the Team. Find out what Avitas has to offer…

Why become an Avitas Wealth Management Growth Partner?

You want to deliver streamlined solutions for your clients—without distractions

You want to join a team with three decades of experience building multi-generational relationships and trust

You want to offer investment solutions managed in-house, bringing your clients closer to their investments

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Who makes an ideal "Growth Partner" for Avitas?

Ideal Candidate

1. Proven business development & relationship management success
2. Fee-only or desire to convert to fee based
3. Track record or sincere interest in building multi-generational relationships
4. Desire to work in team-based environment
5. Aligned to the AWM Mission and expected to think "like an owner"
6. Target: $50M in AUM and 5 years of industry experience

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Being Part of Team Avitas

What we offer

- Incoming referral stream to Avitas supports both the advisors and the firm
- A tenured and dedicated service team and a robust process that works
- Access to the centralized, Total Wealth Organization, platform
- Avitas is growing its $900M in AUM through multigenerational approach and unique investment capabilities
- Tax-efficient proprietary portfolios managed in-house directly for your clients, and access to Avitas Capital Private Equity offerings

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Long Term Career Opportunities

Opportunity For Career Growth

- Team based approach means:
  - No “silos” = Opportunity for Growth

- Commitment to career development

- Competitive compensation

  Avitas “wins together” means:
  - Salary based on “day one” contribution
  - Variable compensation linked to client revenue > uncapped
  - Individual and team-based bonus for firm growth
  - Solid benefit package

- Path to partnership within the firm:
  - AWM Growth Equity Plan

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LEARN MORE ABOUT:

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Contact:

Russell Evans Russell@AvitasWealth.com **424-371-9022**

Catherine Gerst Catherine@AvitasWealth.com **424-371-9011**

AWM Mission

Provide an improved experience for wealthy families

1. Utilization of our Total Wealth Organization (TWO) platform.
2. Create multi-generational relationships built on trust and transparency.
3. Direct management of client portfolios means greater accountability.
4. Fully disclosed advisory fees for all that we do.
5. Fiduciary responsibility to all clients is the backbone of our approach.
6. The “Fit” – Ensuring clients are right for us and we are right for them leads to successful partnerships.

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Total Wealth Organization (TWO)

- View all your assets – including held away accounts – and net worth on the TWO Platform
- Collaborate with an Avitas in-house Certified Financial Planner®
- Understanding "what if?" scenarios and how to best plan for life's unexpected events
- Identify the missing pieces of your financial picture
- Utilize succession planning, wealth transfer, and charitable planning strategies
- Secure your important documents in a virtual vault

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Portfolio Management

AWM's Portfolio management means accountability.

- Avitas portfolio managers select each stock and bond in the portfolio
- We have relationships with multiple trading desks and research sources
- Emphasis on tax sensitive portfolio management
- Avitas Wealth Management co-invests in AWM Portfolios alongside our clients
- Direct asset management reduces fee layering and intermediaries costs

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