BALLENTINE
CAPITAL ADVISORS

A Different Degree of Wealth

Wealth Management & Retirement Planning.

Retirement Planning • Investment Analysis • Tax Planning • Financial Planning • Risk Management

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Mission Statement

Our mission is to ensure that our clients are able to live a fulfilled life financially. We recognize that financial success for clients increases dramatically if the investor is educated and coached to not fall in the trap of behavioral mistakes that plague the average investor. Therefore, we strive in this endeavor to deliver a different degree of wealth to those we are privileged to serve.

About our Clients

Our clients step into our office and are met with a caring advisor and staff who are not only dedicated to providing current information and advice in our areas of specialty, but also strive to foster long-lasting relationships built on trust and respect for our clients. At the end of the day, and throughout each client's life stage, we are committed to keeping our clients' best interest in mind.

Ballentine Capital Advisors offers the guidance and personal dedication needed to help each client reach their financial goals.

Our firm works closely with each person to:

- Assess wealth needs and desires
- Plan for a lifetime
- Implement strategies that tailor specifically to the client's unique situation
- Monitor and review for adjustments

From wealth maximization in retirement to small business planning, we work as a team to help each of our clients attain the financial success they desire.

What type of client would benefit the most?

We can best help those who have achieved a degree of wealth and wish to improve upon their success. Generally, clients with investable assets of at least $500,000 or who may reasonably have that amount or more in the next three years find the most value from our services.

Our View on Wealth

Why Choose Us?

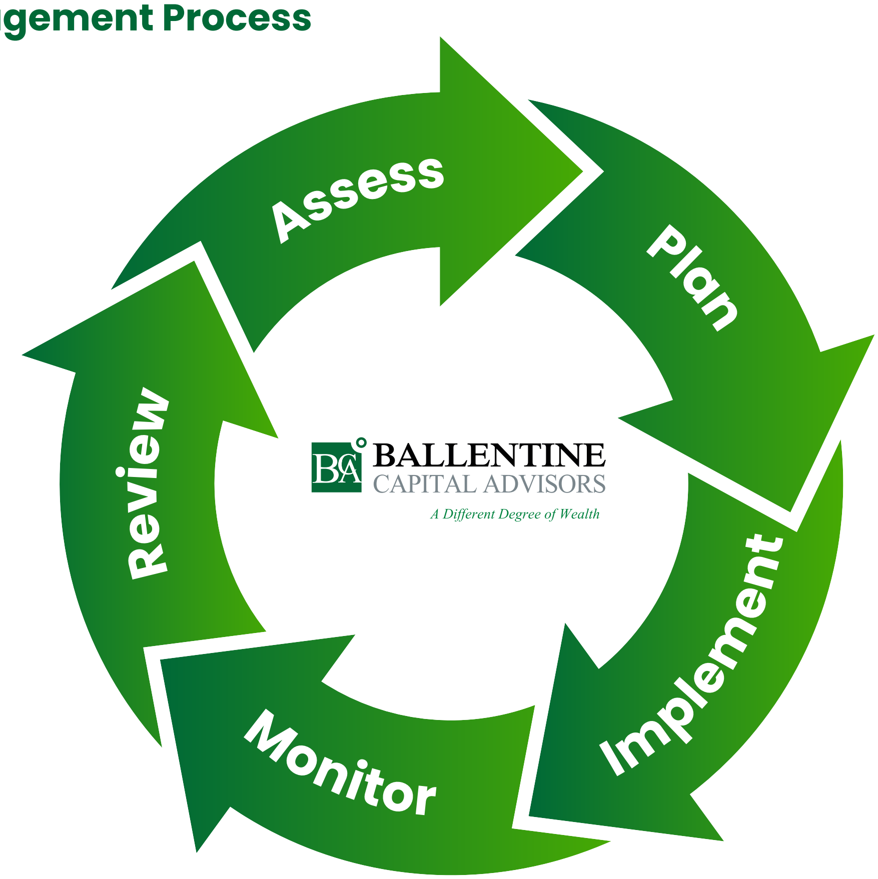
- We know inflation and taxes will reduce the value of a poorly designed portfolio or retirement plan, so it is critical to have a plan to combat these potentially destructive forces to a person's wealth. The creation and execution of this plan, for most, can be the difference between financial peace and financial turmoil.
- We work for our clients and not Wall Street, so we are able to independently and objectively assess, review and analyze how the wealth of our clients can provide an income for their lifetime and a legacy for multiple generations.

Why Ballentine Capital Advisors?

With many financial institutions peddling their proprietary products and services, it is critical for investors and retirees to get objective, independent advice regarding their wealth.

- We are entrusted with some of the most important decisions a person will make in their lifetime, so we believe it is critical that an investor structure their portfolio and retirement income to capture returns based on the market and not an active manager.
- We believe you have the right to seek a relationship with a trusted, qualified financial advisor, whether that is us or another. We are honored if we are entrusted with this responsibility.

Wealth Management Process



Services

Wealth Maximization Planning

- Assess wealth from all angles
- Investment, tax, and risk management coordination
- Professional collaboration with CPAs, attorneys, and others
- Family legacy planning

Retitrement Income Planning

- Helping to create retirement income that fulfill your lifestyle
- IRA rollovers
- Pension election options and rollover decisions
- Portfolio analysis and design

Small Business Planning

- Ownership structure evaluation for estate and tax planning strategies
- Planning for buy-sell options for the owners
- Business succession planning
- Retirement planning services—Fiduciary Support

Investment Portfolio Analysis & Planning

- Coordination of goals and investment strategies
- Portfolio evaluation and recommendations
- Tax alignment of investment planning
- Asset allocation to maximize risk / return optimization

Contact us to learn more about Wealth Management and Retirement Planning from Ballentine Capital Advisors

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