



PER STIRLING

Performance • Perspective • Per Stirling

Our commitment is to work with clients in whatever way best suits their needs, and to serve our clients, and their advisors, with an unsurpassed level of expertise, communication, service and dedication.

Our core competencies include fee-based portfolio management services, financial planning, wealth management, and the implementation of financial plans through custom-designed advisory portfolios, institutional growth strategies, and more traditional investment and insurance brokerage services.



Per Stirling Capital Management is an S.E.C.-registered investment advisory firm that specializes in financial planning, portfolio management, and other wealth management services for high-net-worth individuals and institutions.

Our portfolio management services are as unique and varied as the financial objectives of our clients, and include both custom-designed portfolios and a series of growth portfolios managed by Per Stirling's Directors.

Our wealth management services include:

- Retirement Planning
- Wealth Transfer Strategies
- Tax Planning
- Risk Analysis and Insurance
- Asset Protection Strategies
- Cash-Flow Planning
- Charitable Giving Strategies
- Executive & Employee Benefits
- College Planning

Per Stirling Investments caters to the needs of Per Stirling clients who prefer to work with their advisor under the traditional brokerage model.

As a branch office of its unaffiliated broker-dealer, B.B. Graham & Company (member of FINRA and Securities Investor Protection Corporation), and through its clearing firm, R.B.C. Correspondent Services, Per Stirling Investments provides its registered representatives, and their clients, with an independent platform free from quotas, proprietary products, and many of the other potential conflicts of interest that are inherent in the more traditional commission-based environment.

"How many millionaires do you know who have become wealthy by investing in savings accounts? I rest my case."

- Robert G. Allen

Our company's success is, by design, inextricably linked to the success of our clients, and we endeavor to consistently provide a client experience that combines fiduciary levels of client care with superior investment results, and unparalleled levels of client service.

We embrace the fiduciary nature of the asset management, financial planning, and consulting services provided through Per Stirling Capital Management, and we echo this commitment to put the interests of our clients first and foremost across all aspects of our organization.

We invite you to explore the benefits of a uniquely different perspective on financial services, and to discover why so many successful clients, and their advisors, select Per Stirling as their financial partner.

www.perstirling.com



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