Investment Management

Investment Philosophy

True client service is realized when the client is fully heard and understood, and investments are made in the most efficient way possible to accomplish the client's goals.

Investment Methodology

We look at investments across the universe of individual stocks, individual bonds, exchange traded funds, mutual funds, annuities, and structured notes in order to customize the right plan for you.

ESG Investing

ESG investing strategies take environmental sustainability, social considerations, and corporate governance into account when evaluating investment opportunities.

(561) 437-4770 4500 PGA Blvd, Suite 304A, Palm Beach Gardens, FL 33415 csearcy@pursuitwealth.com

Financial Planning

WEALTH MANAGEMENT

Everything starts with a plan.

Founding Father Benjamin Franklin is often credited with saying

> "If you fail to plan, you are planning to fail."

We at Pursuit Wealth Management believe in the importance of planning. Our clients are managing work, caring for children (and sometimes parents), running households, and much more.

While most of their attention should be on managing their current affairs, someone needs to keep an eye on the future to make sure the family succeeds long term.

We work with you to craft a financial plan, ensuring we never lose sight of your future goals.

It's our job to help guide you through life's many phases. Delivering advice that's tailored to your unique set of circumstances requires an intimate understanding of the things that drive you.

At Pursuit Wealth Management, we believe in the importance of starting with meaningful conversations.

Please Note: The scope of any financial planning and consulting services depends upon the terms of the engagement and the specific requests and needs of the client.

PWM does not serve as a law firm or a certified public accounting firm. PWM does not prepare legal documents or tax returns.

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Education Planning

Pursuit Wealth Management

PLAN FOR YOUR CHILD'S OR GRANDCHILD'S EDUCATION.

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Retirement Planning

Pursuit Wealth Management

PLAN FOR YOUR DREAMS.

It takes a lifetime of proper planning to have the financial freedom to live the life you've dreamed of in retirement. It's never too early or too late to start preparing for that next phase. As your financial advisors, we are here to be a resource throughout that process – we educate you on the options you have available to you.

What phase of life are you in?

Saving for Retirement

Approaching Retirement

In Retirement

The guidance you will need and questions you might have will vary substantially.

- Am I doing enough to prepare for retirement?
- Will I outlive my savings?
- What will I do with all this free time?
- What should I do with my investments?
- When should I start taking my Social Security benefits?

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Charitable Planning

Pursuit Wealth Management

PHILANTHROPIC WISHES.

Many of us aspire to make a greater impact on the world. Giving or being charitable can take many forms.

Whether it be financial contributions, volunteering your time or sharing your network of connections, having direction and purpose behind the way in which you give can make those efforts more impactful.

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universe of products to find the best investments possible to meet these personal goals.

While we are always looking for superior positive returns on these investments, we also take care to make sure any costs associated are reasonable and that funds are invested in a tax-smart way.

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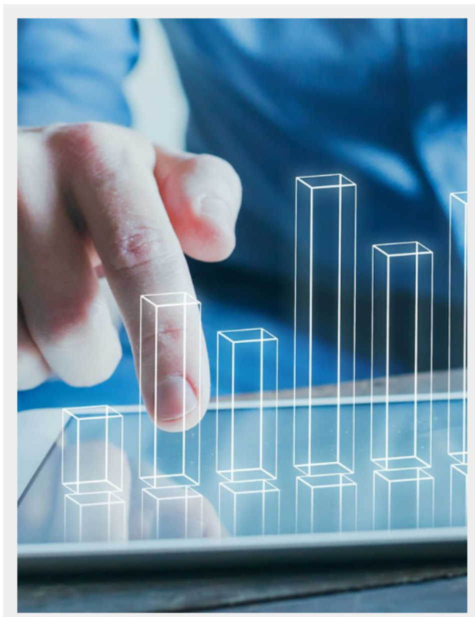
Investment Methodology



Pursuit Wealth Management

CUSTOMIZED MODELS.

Pursuit Wealth Management creates proprietary, customized models to accomplish targeted and tax efficient outcomes for our clients. In creating our customized models, we use many different types of investments to maximize the return for our clients.

In addition to our ESG criteria, we look at investments across the universe of individual stocks, individual bonds, exchange traded funds, mutual funds, annuities, and structured notes.

While each of these types of investments have many different options, it is the way they blend together in a portfolio to work toward a final goal that matters most.

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Title: ESG Investing • Pursuit Wealth Management
Link: https://pursuitwealth.com/our-services/investment-management/esg-investing/
Date: 10-21-2020

ESG Investing

Pursuit Wealth Management

WHAT IS ESG INVESTING?

ESG investing strategies take environmental sustainability, social considerations, and corporate governance into account when evaluating investment opportunities. The goal, long term, is always to generate sustainable returns for investors.

At Pursuit Wealth Management, we believe that it is important to always have an open mind to how investing can change over time. The 1980's saw the proliferation of mutual funds as a popular investment option instead of buying individual stocks. In the 2000's, Exchange Traded Funds (ETF's) became popular because of their low cost. Another shift may be materializing in the investment world right now in the form of ESG investing.

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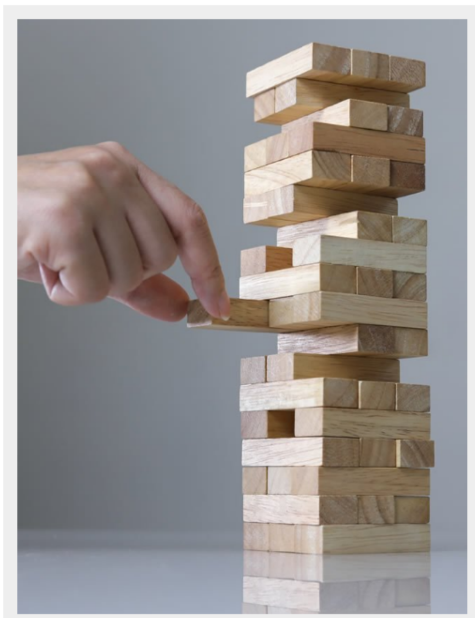
Risk Analysis



Pursuit Wealth Management

HEDGE AGAINST A NEGATIVE OUTCOME.

One of the most important components of a financial plan is understanding and managing risk. While it's impossible to completely avoid risk, there are ways to reduce your exposure and the impact it may have on your life.

Although we are all aware that risk surrounds us daily and in almost everything we do (the risk of being in an accident on our way to work, stock market declines, loss of income due to injury, damage to some of our most valuable assets, etc.), we are rarely proactive about regularly assessing our exposure and protecting ourselves when necessary. A well-crafted financial plan will do just that.

Once risk has been identified and impact of severity assessed, we can then determine how to properly plan for and hedge against a negative outcome. One of the most common ways to transfer risk is through insurance.

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Business Services

WEALTH MANAGEMENT

It's not just about the business you've built. It's about the legacy you're looking to leave.

Business owners are known for being visionaries, innovators, risk takers, creators, and leaders. You've built your businesses with good old-fashioned hard work – blood, sweat, and tears. In many cases you've done it by figuring things out as you go along. As your company evolves, you adjust and evolve along with it. Unfortunately, many of you have done it without any formal plan in place. You assume you'll never retire and have no intention of transitioning your business.

The reality is, there will come a time when you are no longer in control of your most valuable asset. Nearly half of businesses transition involuntarily due to death, disability, divorce, or disagreement. There is a high likelihood that the transition won't be in your control unless you put a plan in place in advance. Being prepared for this life changing process takes time, requires guidance from professionals who understand the challenges you'll be faced with and should involve those you trust most – spouse, children, and business partners.

At the end of the day, it's not just about the business you've built. It's about the legacy you're looking to leave and how that impacts those around you – your family, your employees, your customers and your community. Our job is to help you through that process. We're here to ensure that you and your business are prepared regardless of when that time may come.

Business Services Include:

- ✔ Company Retirement Plans
- ✔ Key Man/Cross Purchase Insurance
- ✔ Bonus Structuring
- ✔ Benefits Consulting
- ✔ Business Valuations*
- ✔ Business Transition Consulting*

*Business Valuations and Business Consulting Services are provided through Pursuit Consulting LLC.

The good news is the possibilities are endless.

No two transitions are alike. Rather than attempting to outline all the possibilities, we'll educate you on the options you have available to you during each phase of the process – before, during, and life after the transition.

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