



▶ FIVE  
MISTAKES.

We can help you avoid.



# BE IMPULSIVE.

And you could erase  
10 years of value.

In the investment world, one emotional mistake can wipe out years of growth. True North Advisors is an independent wealth management firm founded by experienced professionals who understand that expert advice is best delivered through an objective perspective, not swayed by emotional reactions to short-term changes in the markets. We guide your financial growth strategies through an intelligent, disciplined approach, so you can rest assured that your portfolio's performance is well aligned with your goals, year after year.



# FOLLOW TRADITION.

And your opportunities  
may be limited.

Sometimes breaking with tradition is a good thing. While traditional brokerage firms benefit from selling products, at True North, we benefit from creating the plan that is right for you. We have no ties or financial interests in any products we propose and are not constrained by pre-established portfolio platforms. This independent approach means that we can tap into a world of financial possibilities to develop a plan that best fits your unique financial goals. Your plan should be as individual as you are.



# LISTEN TO EVERYONE.

And you will miss the wisdom of the few.

Today's investors are bombarded from all directions with complex and sometimes confusing messages—from tax strategies to insurance policies to charitable giving to real estate deals. Our task at True North is simple: to help you navigate these complexities within the context of your long-term plan. As your trusted advisors, we bring together all aspects of your personal portfolio, providing perspective and advice so that all decisions are aligned and integrated with your goals.



# CONFLICTS OF INTEREST.

Are not in your best interest.

Unlike large brokerage firms, whose system of doing business creates subtle but harmful conflicts of interest, True North Advisors is motivated only by our clients' interests. Our advice-driven model removes conflicts of interest—no commissions, no hidden or indirect fees. We guide your investment strategies through an intelligent, disciplined, conflict-free approach, fiercely protecting your interests with objectivity and transparency.



# TRUST NO ONE.

Until they prove  
trustworthy.

At True North, we understand that trust comes with responsibility. Our firm is founded on the principle of stewardship—the careful and responsible management of your financial assets to reach your goals now and in the future. Our truly independent model aligns people, process, and philosophy to provide best-in-class wealth management. Every aspect of our company functions so that trust and accountability are high, investment choices are actually choices, ethical and moral standards are upheld, and personal relationships are respected.

True North Advisors is an independent, wealth management firm founded in 2000 by experienced professionals who understand that expert advice can only be provided with complete objectivity and transparency. It is this truly consultative approach that puts our clients' needs first so that wealth can be enjoyed as the blessing it should be.

Today, True North serves over 500 private and institutional clients throughout the United States. We have the size, scale, team, and systems to provide world-class service that delivers on the promise of true, trusted stewardship. And, with a 98% client retention rate, we genuinely appreciate and value the continued satisfaction of our clients. We invite you to learn more about True North Advisors.

*True North: Where Trust Meets Responsibility.*

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