

THE CAPITAL COMPANY CREED

The Six Covenants of the Capital Company Experience

1. CREATE CLARITY WHERE THERE IS CONFUSION

Take away the confusion of capital markets and the chaos of daily financial matters so clients focus on their dreams, goals and families

4. PROTECT & PERPETUATE FINANCIAL ASSETS & FAMILY CONTROL

Programs that will protect and preserve the assets and efforts of our clients and deliver legal and financial control in times of trouble

2. FOCUS ON RELATIONSHIPS, NOT FINANCIAL PRODUCTS

As a fee for service company we are financial product agnostic

5. STRUCTURE THE MOST TAX EFFICIENT RETIREMENT

Clients require legal and robust financial structures to build their wealth for retirement

3. PROVIDE THE TRUTH IN ALL WE DO

We believe in fee transparency and alignment of interests

6. GIVE ADVICE ACROSS MULTIPLE GENERATIONS

Transferring wealth through generations requires principles and stewardship to family members



THE CAPITAL COMPANY

EVIDENCE BASED INVESTING

Utilizing "Evidence Based Investing" as our core investment methodology we seek investment returns in lockstep with clients' portfolio mandates while mitigating fee, cash and tax drag. Managing money is a science, not an art.

THE PROTECTION COMPANY

ESTATE PLANNING STRATEGIES

The Protection Company provides specialist estate planning strategies for the protection and perpetuity of assets for future generations. This ensures clients have financial and legal instruments to control and preserve their estate, irrespective of unforeseen events.