NEPSIS®
INVEST WITH CLARITY®

It's All About Clarity®

PROCESS BEFORE PROGRESS®

We are experienced, active investment managers who are committed to helping clients reach their unique goals. To accomplish this, we harness the power and leverage the flexibility that Separately Managed Accounts (SMAs) provide investors. Our process is based on solid fundamentals and long-term planning and investing. Through our process, we can provide more holistic service and greater transparency.

THE FOUR KEYS TO INVESTING FOR SUCCESS…
PHILOSOPHY STRATEGY FLEXIBILTY TRANSPARENCY®

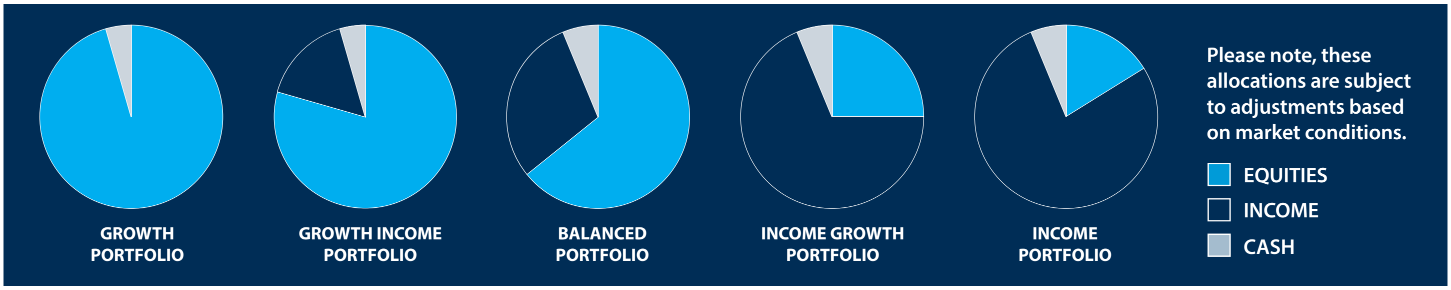
Investment Philosophy: Investors should invest like they are business owners – knowing what they own and why they own it. We believe in diversification, but not over-diversification, as you often find with mutual funds and ETFs. We also believe that volatility creates opportunity and is needed for long-term investment success.

Investment Strategy: We utilize fundamental analysis, not timing the market, and we invest in both secular and cyclical trends. Our portfolios consist of roughly 25-40 companies, allowing our research team to be selective.

Flexibility: We leverage Strategic Cost Averaging®, an investment strategy that invests unequal monetary amounts timed to specific market and/or company events, which provides an investor the opportunity to purchase additional shares of a company over time.

Transparency: We have a committed relationship with the custodian of our clients' investments and assets, Pershing Advisor Solutions LLC "PAS", where our clients can see all of the activity in their accounts at any time.

Portfolio Personalization: Our portfolios can be modified to best align to our clients' particular investment restrictions or guidelines. We have five investment allocations:



Sell Discipline: Every position in our portfolios is owned for a specific reason. Correspondingly, when positions or businesses we own are sold, it is also for specific reasons. We have four distinct sell disciplines we adhere to:

1. Fundamentals of the business or the sector have changed.
2. A perceived (potentially) better opportunity has become known.
3. Selling a portion of a position to lock in profit or bring portfolio back to appropriate allocation balance.
4. Tax Management - Tax loss harvesting for offsetting future gains or current gains.

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Podcast: Invest With Clarity® Podcast

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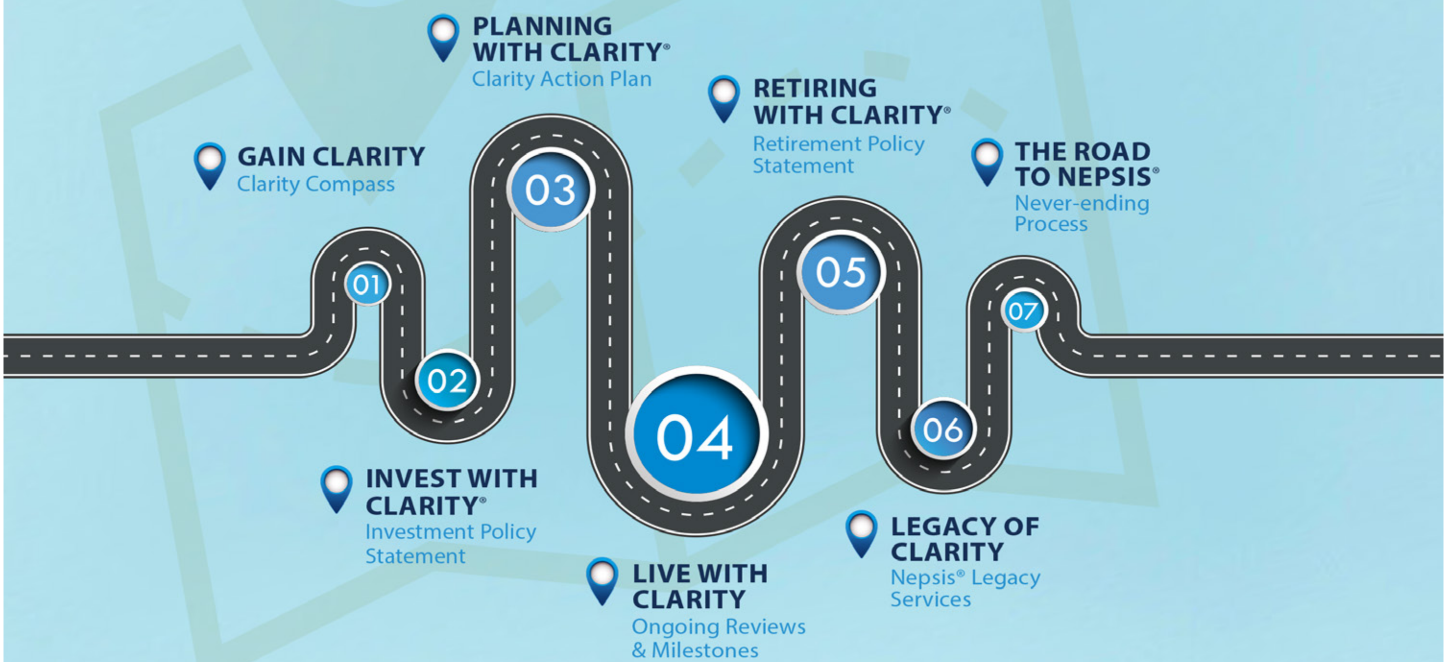
CLARITY ROADMAP®

No matter where you are on your unique journey, our proprietary planning process is designed to help you accomplish your goals.

It all starts with taking the first step towards gaining clarity. At Nepsis®, we are here to help you discover a path to better wealth for a better life.



- Easy Onboarding + Enhanced Client Experience
- Actively Track Milestones + Updates

- Retirement Policy Statement
- Ongoing Reviews & Milestones

- Estate + Legacy Planning
- Charitable Giving + Tax Strategies

Get to Know Us through Our Podcast…

We invite you to listen to Mark Pearson share his message of Investing With Clarity®.

Mark believes that success in investing, as in life, is the result of absolute clarity. Join us as he shares stories and provides clarity around investments in a way that just makes sense.
Listen at investwithclarity.podbean.com

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