

Sopher Advisor
ADVANTAGE



Committed to pulling
the pieces together. Investment
Planning & Management in a Global Age

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SOPHER

INVESTMENT

MANAGEMENT



Putting all the pieces
together - Managing assets
for high net worth
individuals, families
and trusts.

STRATEGIC PLANNING
& OVERSIGHT IN A GLOBAL AGE

SOPHER INVESTMENT MANAGEMENT

Sopher Investment Management is an independent wealth manager that systematically tailors unique solutions for individuals, families, trusts, non-profits, and foundations. Since 1992, we have helped clients achieve their financial goals by protecting, building, and creating wealth. Through our experience we have the insight and perspective for taking measured risks in order to achieve your financial objectives.

How? We customize solutions, confirm investment objectives and make adjustments based upon client input and market conditions. Once we define objectives, we react, plan and perform for you.

INVESTMENT CHALLENGE

How do you manage all aspects of your investments?

Over the years many have turned to Sopher Investment Management. Our clients appreciate our investment process, the way we build lasting financial relationships, and our personal commitment. Our services provide convenience, enhanced communications, control and security.

Sopher Investment Management is driven to deliver results and anticipate the needs of our clients. We take the time to listen and plan investment alternatives with our clients which allows us to balance risk with reward. We strive to create appropriate and realistic solutions for each client.



We work with you to determine an investment approach and to enable you to reach your financial goals. Because circumstances and desires can change, we reassess your financial strategies on a regular basis.

While reviewing the investment options, it is important to keep in mind that the economic cycle of our country is now attached to the world, so that internationally, we must review exposures that companies may have globally. Active asset allocation allows us to reduce risk with diversification.

ORGANIZATION

As an independent, unbiased wealth manager, we do not sell any products, receive commissions, "soft dollars" or other kickbacks. We earn a fee based upon the percentage of assets managed so our interests are aligned with those of our clients.

We utilize our proprietary internal security selection model to minimize risk and provide a reality check for investment banking research, analyst assumptions and general market sentiment. The internal model grounds our research in fundamental analysis as we evaluate emerging trends.

PROCESS

Sopher Investment Management uses an internal investment selection model which minimizes risk over the entire business cycle. We achieve investment diversification by many methods including: equities by sector, industry, geography, and many other criteria. We also utilize select mutual funds, US Treasury Inflation Indexed Securities (TIPS), commodities, currency baskets, Real Estate Investment Trust Securities (REITS) and other instruments to varying degrees during differing times in the market cycle.



Our investment philosophy provides clients with a vision, focus, and clarity. We believe in the preservation of capital and building wealth through a patient, prudent approach. We believe in providing consistent performance. We like to help our clients make money.

As an independent Vermont firm, we always place our clients' interests ahead of our own. Our independence allows us to choose the best resources available to us in order to systematically and prudently reach our clients' goals.

When it comes to their investments, our clients appreciate our active management and our interest in their after-tax returns.

Sopher Advisor ADVANTAGE



Our process enables us to regularly engage our clients with an investing discipline that avoids the 'flavor of the day' investments.

Our Approach to the Investment

Business is Something
You Can Understand
and Feel Confident In

We Provide Exceptional Service
For Our Clients