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Writing and design sample

Assignment— Persuade high net-worth individuals to entrust their wealth to an RIA who pursues a strategy of global diversification

(Website sample pages)

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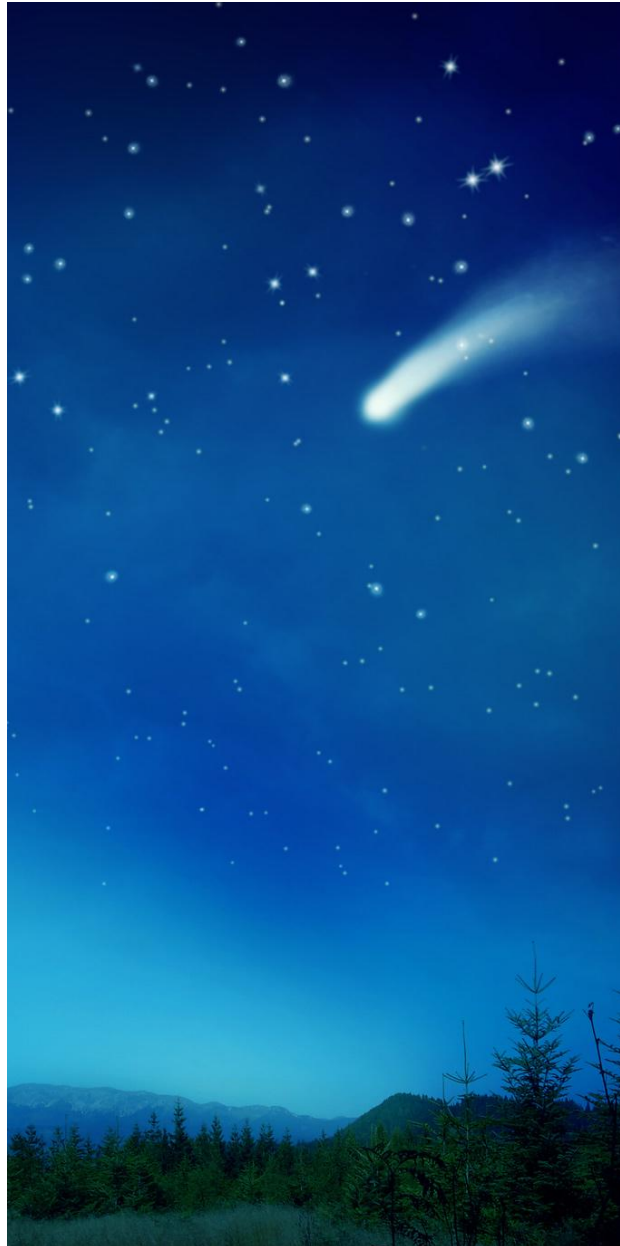
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Your most important investment decision: To whom will you entrust the stewardship of your family's wealth, hopes and dreams?

Most likely your investment portfolio represents the results of your or your forbearers' toil, prudence and good fortune. Your investments embody the harvests of days past and your family's hopes and dreams for years to come.

Your choice of a steward for your family's hopes and dreams is an undertaking best not entered into lightly or taken casually.

If you do not have the expertise, the time and the desire to manage your investment portfolio yourself, then the most important investment decision you will ever make is your choice of who will manage your portfolio for you.



What qualifications should you look for in a portfolio manager?

Global perspective

Managing an investment portfolio effectively is more challenging than ever: The United States no longer dominates the world economy or world trade. Over the past five years, the dollar has lost a quarter of its value against other major currencies. The future of the U.S. dollar as the premier international currency is in jeopardy. In future years, the value of the dollar against other currencies will continue to fluctuate.

Growing demand for and dwindling supplies of energy and other resources will continue to put pressures on commodity prices, governments and economies.

To be effective today and into the future, a portfolio manager must have a global perspective—one that takes into account how political developments and technological trends will affect the growth of economies, the profitability of companies, the prices of commodities and the strengths of currencies. To be effective today, a portfolio manager must view investments in any economy—the U.S. included—in the context of global trends, cycles and developments.

Attention to preserving your wealth's purchasing power

Not only does the decline of the dollar against other currencies erode your wealth's purchasing power, so can inflation within U.S. economy. Your portfolio manager must find ways to protect your wealth against declines in purchasing power.

Market savvy, psychological poise, skeptical open-mindedness

The world's financial markets continue to grow more volatile and interconnected. Financial markets are auctions. They are auctions in which bid and ask prices reflect participants' expectations about the future. Any event or development that affects people's expectations can affect market prices.

To be effective, a portfolio manager needs the market savvy to recognize the danger signals of irrational exuberance. He or she needs the psychological poise to see when the herd may be chasing a mirage or in danger of running off a cliff. He or she needs the open-mindedness to recognize the investment possibilities of new technologies balanced by the skepticism to know that, when something seems too good to be true, it probably is.

Wisdom beyond the conventional

Conventional wisdom and many financial advisors claim that the financial markets are efficient and every investor would be better off in an index fund. The exceptional portfolio manager knows that, if markets were truly efficient, they would not go into bubbles.

Recent bubbles in technology stocks and the housing market show that the financial markets are not truly efficient. Hence, index funds guarantee neither rational investments nor wealth preservation.

As the value of the dollar has fallen over the past five years, investors in dollar-based index funds have taken significant hits in the global purchasing power of their wealth.

The next time one of your friends at the club says, "I'm in an index fund. That's the smart thing to do," you might want to say, "Being in an index fund doesn't keep you out of a bubble. Being in an



index fund doesn't protect your purchasing power."

Ability to translate global perspective into investments that work for you— your situation, your goals, time horizon and personality

While a portfolio manager needs the informed perspective to evaluate the likely reaction of financial markets to world developments, he or she is not managing money in the abstract. He or she is managing your money— your wealth.

To manage your wealth effectively, a portfolio manager must have the sensitivity and interpersonal skills to relate global developments and market behavior to your personal situation,

individual goals, investment horizon and appetite for risk. If your primary goals are preservation of wealth and preservation of purchasing power and your portfolio manager's goal is to turn a little wealth into a lot of wealth as quickly as possible, most likely you will be exposed to far more risk than you can tolerate— psychologically or financially.

If your portfolio manager has a three-month investment horizon and you have a twenty-year investment horizon, you are likely to be in for a bumpy ride.

Focus on after-tax returns

If one of your goals is to control your incursion of capital-gains taxes, then your portfolio manager needs the administrative infrastructure and skill to take into consideration the tax basis and holding period of every security in your portfolio.

When you choose a portfolio manager, think about the challenges of managing investments in a dynamic, global economy. Find out if the person and the firm you are considering has the qualifications, the perspective and the skills to meet those challenges.

Omega's Registered Investment Advisors (RIAs) will manage your portfolio in the context of a fiduciary relationship

The principals of Omega Capital Advisors, LLC are Registered Investment Advisors. We are legally required by the Securities and Exchange Commission (SEC) to act in your best interest. We will provide you with investment advice and manage your portfolio in the context of a fiduciary relationship.

We will formulate for you asset allocations designed to serve your best interests and match your goals, concerns and personality.

We will do our best to manage your investment portfolio in a way that you can understand, that makes sense to you, that earns your trust and confidence and that immunizes you from the anxiety—the alternating euphoria and panic—that comes from chasing after every latest fad or bubble in the marketplace.



Omega Capital Advisors brings a long-term, global perspective to protecting your wealth and preserving your wealth's purchasing power

At Omega, we bring a global perspective to managing investments. We take a long-term view.

We believe in global investing and in global diversification. Investments in strongly growing economies of other nations oftentimes offer excellent returns relative to their associated risks. So long as the value of the world economy grows, the value of a globally diversified portfolio will grow.

Returns on investments in other economies usually have lower correlations with returns on investments in the U.S. economy than do additional investments in the U.S. economy.

Investments in other economies thereby improve portfolio diversification. The asset allocations we recommend balance investments in the U.S. with diversification across global markets.

To achieve optimal diversification, we believe asset allocations should go beyond the traditional investments in stocks, bonds, cash and real estate. Because of the low correlation of their returns with those of the traditional asset classes, we believe you also should allocate some of your assets to investments in raw materials and energy assets.

We believe that, not only should your investments preserve your wealth, some of your investments should be targeted to preserving your purchasing power in the face of potential declines in the value of the U.S. dollar. Most likely we will recommend that your portfolio include investments in metals and currencies— assets that ordinarily have the best chance of holding value if and when the U.S. dollar loses value either through inflation or against other currencies.

Our approach to asset allocations strongly aligns with that of David Swenson who manages the endowment of Yale University. During Mr. Swenson's twenty-plus-year stewardship of Yale's endowment, this approach has achieved exceptional returns.

To guide our long-term investments in the global economy, we track economic, political, demographic, cultural, natural and scientific developments around the world. We identify the twenty major trends and issues we believe will drive investment performance over the next twenty years. We call this perspective and analysis our 20/20 Global Vision.

Omega investments benefit from the best thinking of many of the world's best fund managers

To turn asset allocations into investments, Omega has ongoing relationships with fund managers who specialize in each of the asset classes in which we recommend you invest. We have reviewed the performance of and analyzed the strategies of every fund manager with whom we do business. We have good reasons for our confidence in their abilities and integrity.

Through these relationships, we give you and your portfolio access to the best thinking of many of the most successful and reliable fund managers in the world.

At Omega, we also manage several funds ourselves. On average, we manage in-house approximately 50% of our assets under management.

Adam Quelquechose, President and CEO of Omega, has managed portfolios successfully for institutions and high-net-worth individuals for over twenty-five years. Adam's investment strategies are especially attuned to maximizing the long-term benefits of diversification across markets and asset classes.



When we propose allocation of your assets to specific funds, we provide you with comprehensive information on each fund:

- Investment strategy
- Historical return
- Historical excess return
- Historical performance against benchmarks
- Historical volatility
- Historical composition

We believe each fund has the potential to serve you well. We believe the combination of funds over a long-term investment horizon will grow your wealth and protect your wealth's purchasing power. We believe our approach to portfolio management and our fund managers will save you from the anxiety and potential catastrophes that all too often come from chasing after stellar short-term results with concentrated allocations.