NEPSIS®

Wealth Management | Tax | Insurance | Legal

LIVING WITH CLARITY™

www.NepsisInc.com

Nepsis is a Greek word which means to be watchful, alert and vigilant with a clear and sober mind against illusions and fear.
In a word, Nepsis is Clarity – it is at the core of all we do.

WE ARE NEPSIS, INC.

Nepsis, Inc. began in 1994 with a passion for helping individuals and families accomplish their investing and financial planning dreams. In 2011, the name of our firm changed from Anchor Capital Management, Inc. to Nepsis, Inc. **Why?** Because Founder and Chief Investment Officer, Mark Pearson, believed this name amply captures the firm's passion and vision to help investors achieve their dreams.

It is our belief that the more clarity individuals have, the more likely they are to stick to their investing and planning goals, through even the toughest of times, and achieve success.

Over the years, our services have expanded to meet the needs of our clients as they face the unique challenges and opportunities life brings. Nepsis® is a SEC Registered Investment Advisory Firm that assists clients by providing the structure, guidance, and resources needed to live with clarity.

MARK PEARSON
Founder, Chief Investment Officer
Host of Invest With Clarity® Podcast

> You can't put a dollar value on CLARITY.
> – Mark Pearson

OUR MISSION

Provide the power of clarity to our clients so they can accomplish their investment and planning goals.

OUR VISION

Changing the investing world one investor at a time through the power of clarity.

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FAMILY OFFICE FRAMEWORK

We help our clients achieve their goals by staying true to our comprehensive and holistic approach. Our family office framework incorporates multiple disciplines to provide the support our clients need to achieve their goals and to ensure we are always serving their best interests.

By viewing your wealth in its entirety and creating a custom comprehensive plan, we can coordinate the critical professional services and resources that are needed to effectively grow and preserve your family's wealth. We believe that our ability to provide comprehensive guidance across your complete financial landscape gives you the freedom and strength to live with clarity.

INTEGRATED WEALTH MANAGEMENT

The Nepsis® team will work to analyze your entire financial roadmap giving you a fully integrated and holistic approach to growing and preserving your wealth to reach your unique goals.

FINANCIAL PLANNING

Your goals, our process. Everyone has a different destination in mind, requiring a different roadmap. Our Clarity Roadmap® solution keeps you moving in the right direction to reaching your long-term goals.

TAX PLANNING

Taxes play a major role in your overall plan and we believe it is paramount to be proactive instead of reactive. Our team executes strategic tax planning solutions to allow you to maximize income, minimize taxes and take advantage of financial opportunities.

PORTFOLIO MANAGEMENT

Through the utilization of Separately Managed Accounts (SMAs), your investments are tailored to you and you alone — designed and managed for you to reach your goals.

ESTATE PLANNING

To ensure your assets are carried on to the people and causes you care about most, we work closely with you to structure your plan and protect your assets properly.

INSURANCE SOLUTIONS

Our dedicated team identifies the instruments and policies needed to provide protection and care for your family, legacy, and material assets.

LEGAL SERVICES

Our attorneys work with you to provide insights and solutions on critical strategies for Trusts, Estate, Wealth Preservation, Legacy Planning, Charitable Giving, and others.

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PLANNING MISTAKES & MISCONCEPTIONS

Investors tend to be their own worst enemy – but this is not entirely their fault. Dalbar studies consistently show, investors sell at stock market lows and buy at stock market highs. The financial media and Wall Street analysts bombard the public with sensational and fear-based news, and many financial services firms fail to better inform and educate their clients. As a result, investors are left without the guidance they need to make the informed decisions required to accomplish their long-term goals.

Here are a few of the common mistakes & misconceptions we see:

FAILING TO LEVERAGE TAX & ESTATE PLANNING

Guidance on how to leverage the benefits of tax and estate planning is paramount. However, many believe that tax planning is expensive and estate planning is exclusively for the ultra-rich. The fact is, both are vital and accessible to you.

MANAGING YOUR WEALTH IN SILOS

Insurance, real estate, 401(K)s, stock options, pensions, trusts, savings and more constitute your family's real wealth. Investors fail to create a comprehensive plan that connects your assets and your planning strategies together.

FOCUSING ON RETURNS & COMPARING A PORTFOLIO TO AN INDEX OR A BENCHMARK

If you don't understand how benchmarks are structured or how their returns are calculated, it's a pointless endeavor. And even with this knowledge, it's never a true "apples to apples" comparison. Your portfolio is personalized and managed to your unique needs and goals.

ALLOWING BIASES TO CLOUD JUDGMENT

Behavioral Finance plays a major role in your financial picture. Many biases exist in the financial world and Clarity is needed to offset these and avoid making yourself your own worst enemy. Eliminating biases from your plan will enhance your ability to invest and plan for success.

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CLARITY ROADMAP®

PROPRIETARY PLANNING PROCESS

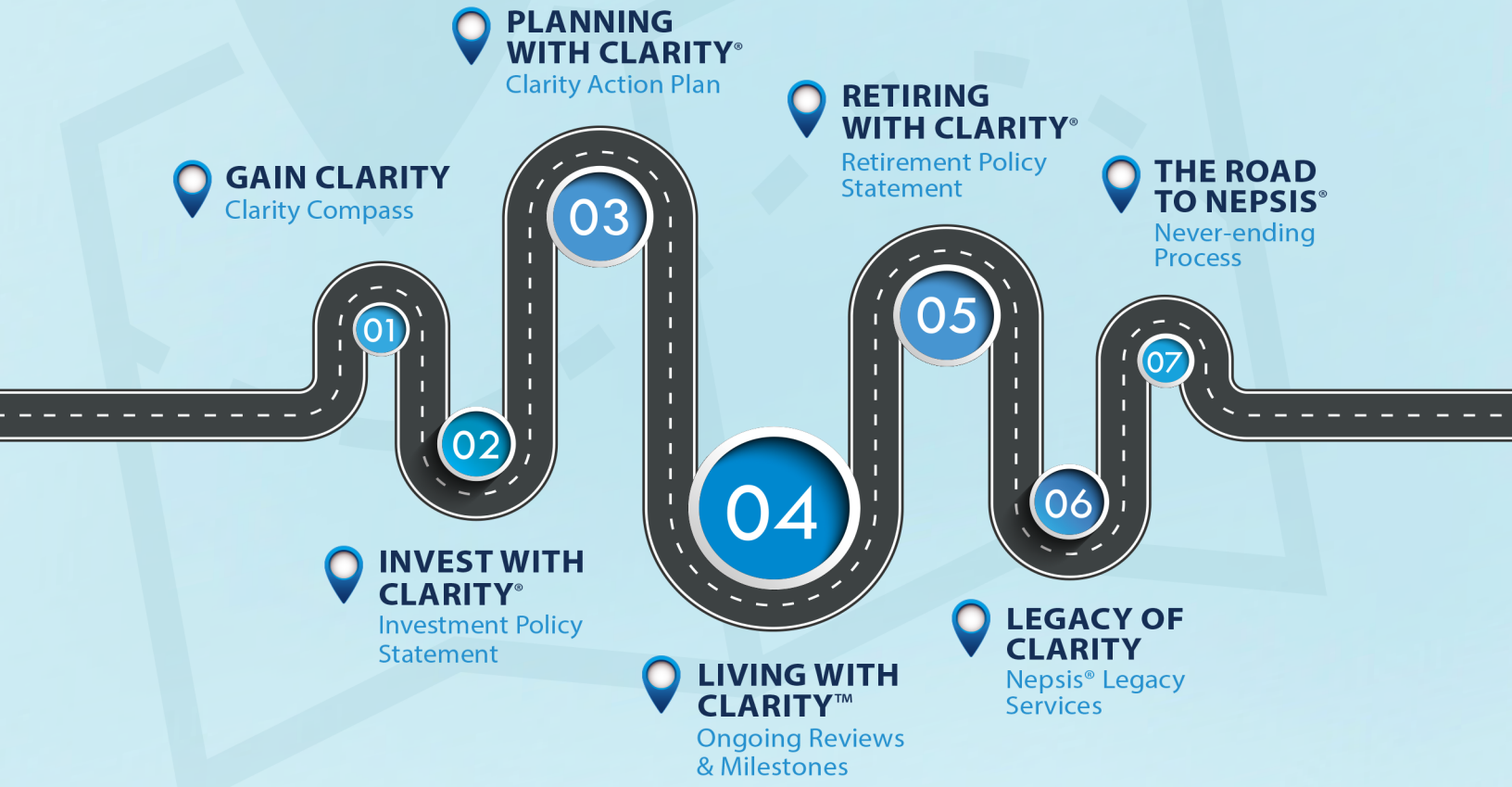
ASK YOURSELF 2 SIMPLE QUESTIONS:

IS YOUR PORTFOLIO DOING THE BEST IT CAN?

If you don't know, you're not alone. It's time for you to find out and we can help.

ARE YOU ON TRACK TO HAVE THE FUTURE YOU WANT?

It's not so hard to tell, and it's never too late to get back on track – if you have the right guidance.



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INVESTMENT PROCESS

> Process Before Progress®
>
> – Mark Pearson

4 KEYS TO INVESTING FOR SUCCESS – PHILOSOPHY STRATEGY FLEXIBILITY 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 market timing, 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 provide an opportunity for an investor to purchase additional shares of a company over time.

TRANSPARENCY

Our clients can see all of the activity in their accounts and we have committed relationships with multiple custodians that oversee our clients' investments and assets.

SEPARATELY MANAGED ACCOUNTS (SMAs)

We specialize in Separately Managed Accounts (SMAs) and believe they afford us the flexibility that allows us to better manage investment, planning and tax needs. All of our portfolios are highly personalized and tailored to our clients' unique financial circumstances.

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STAY CONNECTED...
PUT CLARITY IN THE PALM OF YOUR HAND®

In a world filled with sensational financial media coverage, today's investors need clarity more than ever. That's why we're dedicated to providing investors with real insights and knowledge. Our Nepsis® App and podcast, hosted by Mark Pearson, offer educational, informational and inspirational commentary designed to help investors build better wealth for a better life. We invite you to download our app and start on the Road to Nepsis®, the road to clarity.

THE NEPSIS® APP

The Nepsis® App puts Clarity at your Fingertips®. Gain access to our robust investor communications, educational resources, market commentary, our popular podcast, and much more.

AVAILABLE ON: Available on the App Store · GET IT ON Google Play

INVEST WITH CLARITY® PODCAST

Mark believes that success in investing, as in life, is the result of absolute clarity. In this high-energy podcast, Mark will share stories and provide clarity around investments in a way that just makes sense.

AVAILABLE ON:

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A FAMILY OFFICE FRAMEWORK
THAT BRINGS CLARITY TO YOUR LIFE

CONTACT US TO SCHEDULE A MEETING.
VISIT WWW.NEPSISINC.COM TO LEARN MORE.

NEPSIS®

Wealth Management | Tax | Insurance | Legal

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www.NepsisInc.com
Podcast: Invest With Clarity® Podcast
Blog: www.InvestingWithClarity.com

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