



MONETA GROUP[®]
Your Family CFO since 1869

Who is Moneta Group?

Moneta is an independent group of "Family CFOs" with a rich history dating back to 1869. Consistently ranked among the largest independent investment advisors in the country, our firm serves families and businesses nationwide. In the complex landscape of the financial services industry, Moneta Group stands out from the crowd due to our:

- **Independence** - Moneta Group is owned entirely by its principals so we answer only to our clients - not to outside shareholders. We are 100% aligned with your success.
- **Fiduciary Standard** - We embrace our fiduciary responsibility to work only in the best interests of our clients.
- **Objectivity** - We work on a fee basis and receive no compensation from investments, allowing us to recommend only the products and services that provide the best solutions for you.
- **Expertise** - We pursue professional designations and continuing education opportunities to ensure we deliver the quality of advice clients expect.
- **Scale** - Our size and industry reputation provides access to institutional strategies and cost savings which directly benefit you.
- **Resources** - Support from Moneta's talented management team and professional staff allows our focus to stay where it belongs: on you and your family.



What is a Family CFO?

As Family CFOs, we coordinate the financial affairs of successful families just as a Chief Financial Officer does for a corporation. Our attention to detail and technical expertise help us provide a depth of personalized, conflict-free advice on a range of issues. We deliver all of this through a comprehensive service model that has a single objective: to help you achieve your financial goals.

Our Core Values:

- We are passionate about what we do.
- We act only in our clients' best interests.
- We deliver 'Raving Fan' service.

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