

# BAM Advisor Services:

## Helping Better Serve Investors

Expert, personal service combined with strength — Backed by the full support and expertise of **BAM Advisor Services LLC**, we bring you a powerful team approach to your investment experiences.

We have chosen to work with BAM Advisor Services because we are confident that the alliance brings you important benefits.

### How Does Our Alliance With BAM Help You?

Through our alliance, we are better positioned to offer you the following enhancements:

- ◆ **Enhanced service levels** — You benefit from specialized services that support our in-house offerings. With BAM we can deliver our investment services more effectively, including access to institutional mutual funds, custom bond portfolios, risk management solutions, portfolio analysis, retirement planning and company retirement plan program management.
- ◆ **Combined expertise** — We seek to incorporate the best academic thinking on how markets really work, plus sound investment solutions for turning theory into application.
  - We gain access to BAM's experienced staff as well as the 100+ advisor firms BAM serves, all dedicated to helping clients meet their financial goals.
  - Our combined leverage opens doors to respected academic and professional industry experts.
  - BAM's continuing education programs and publications enable us to remain abreast of important industry developments.
- ◆ **Cost-effective solutions** — You receive special pricing and services through our alliance with BAM and its leveraged relationships.
- ◆ **Back office support** — We can spend more time with you, while BAM assists with the "back office" paperwork and other administrative duties.



### Who is BAM Advisor Services?

BAM was founded in 1997, with headquarters in St. Louis, Missouri. Today it serves a nationwide base of more than 100 Registered Investment Advisor firm clients whose combined assets under management exceed \$4 billion. Many of BAM's advisor firm clients come from the CPA industry and similar arenas that particularly value the academically based, cost-effective approach we seek to deliver.

Our firm is entirely independent of BAM, making our own decisions directly with you. At the same time, we support a common approach to client services:

- ◆ Fee-only pricing structure to facilitate the consultative relationship that clients desire
- ◆ Application of the prudent investor principles described by Modern Portfolio Theory
- ◆ Incorporation of a core passive investment approach (versus attempts at active market-timing and stock-picking activities)
- ◆ Excellent client service standards

