KATHMERE
CAPITAL MANAGEMENT

kathmere.com

Expanding our team and enhancing our service model

We are dedicated to evolving with you and aligning the support and resources necessary to take you to the next level.

Our goal is to provide our clients with comprehensive services and solutions that help them meet multifaceted financial goals. To accomplish this, we need a team of diverse minds with dedicated expertise and specialized experience.

This is why we are growing our team, adding high-level talent and subject-matter-experts who will help us collectively advance your goals. We are expanding our value in the areas we strongly believe add tremendous value to our clients' lives.

Talent to Expand Our Advanced Planning Capabilities

ALAN G. WANDALOWSKI
JD, LLM

- **Chief Planning Officer** and head of the **Advanced Planning Team**
- **20+ years** as a private practice attorney working with high-net-worth individuals on estate and business planning
- **Provides comprehensive education and insights** for clients about their estate plan and relevant advanced planning strategies
- **Collaborates with** financial advisor teams and clients' other advisors, such as attorneys and CPAs, to help clients implement estate plans which minimize taxes, protect assets, and accomplish clients' goals

What is Advanced Planning?

- Estate and legacy planning
- Gifting strategies
- Estate and inheritance tax minimization
- Income tax strategy
- Charitable planning
- Business succession planning

"It has been very rewarding to be able to help families and business owners as an attorney over the last two decades. Bringing that experience to Kathmere creates a more proactive and deeper planning experience and heightens the firm's ability to collaborate with a client's other trusted advisors. My skill set fits perfectly with their client base, and I believe it to be a game changer for the firm and for those they help."

ALAN G. WANDALOWSKI, JD, LLM

Your Efficient Family Office Advisory Team

Client's Tax Team

Kathmere Financial Team

Client's Legal Team

Kathmere Role in Collaboration

- Tax document aggregation and delivery
- Proactive tax planning
- Tax loss harvesting
- Tax payment coordination

Advisory Team

LED BY CFP-LEVEL EXPERTS

- Comprehensive planning strategies
- Reporting
- Financial modeling
- Coordination with outside advisors

Kathmere Role in Collaboration

- Estate plan strategy development
- Periodic proactive review of existing plan
- Proactive insights on impact of legislative changes

Investment Team

LED BY CHIEF INVESTMENT OFFICER, CFA

- Comprehensive portfolio strategy
- Investment due diligence
- Public and private markets
- Stocks, bonds, ETFs, funds, partnerships

Advanced Planning

LED BY CHIEF PLANNING OFFICER, JD, LLM

- Estate and trust planning
- Tax planning
- Business succession
- Charitable planning
- Insurance strategies

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