

Taking a Different Path

A first ascent is the first successful, documented attainment of the top of a mountain, or the first to travel a new route.

"At First Ascent, we are taking a fundamentally different path.

We start by asking,

## 'What would be best for our clients?'

It's amazing where the path leads you, if you start with that simple question."

Scott MacKillop Founder and CEO

## Rethinking Portfolios

The financial services industry has fallen in love with complexity. But complexity is often accompanied by poor results, high fees and a lack of transparency.

Our portfolios are elegantly simple.

We start by constructing a "core" comprised of lowcost exchange-traded funds (ETFs) that provide broad diversification among global securities markets.

We selectively add "satellites," but only if we have a high level of conviction they will add long-term value. Satellites may be actively managed funds, index funds or ETFs.

In building and managing our portfolios we:

- Combine active and passive investment strategies.
- Use low-cost mutual funds and ETFs.
- Focus on minimizing transaction costs.

We believe that by combining active and passive management styles and keeping costs low, we improve our clients' chances of reaching their long-term goals.

For more details about our investment process or the portfolios we offer, visit firstascentam.com.

Reaching your long-term financial goals requires two things. The first is a well-constructed and well-managed portfolio. It's our job to provide that for you.

## Clear and Concise

The second is the knowledge necessary to make good investment decisions. We can help with that too.

We all should have received a course in school about the basics of investing, but most of us never did.

We decided to create that course. The information we provide is clear, concise and understandable.

Visit the Knowledge Center at firstascentam.com. You will find videos and written material designed to help you become a better, more confident investor. It's another way we can help you reach your goals.

## Flat Fees Are Here.

The more we save our clients, the quicker they reach their goals. So we developed a fee schedule that, to our knowledge, is an industry first.

We charge a low, flat fee.

Our flat fee is simple, transparent and clients get to keep more of what they earn.

We can do this because we work with financial advisors who meet directly with their clients and learn about their individual needs, goals and objectives.

That leaves us free to focus on one thing—managing portfolios. By staying focused, we can manage portfolios efficiently for large numbers of clients.

Yes, our fee schedule is unusual, but then so is our focus on doing what's best for our clients. First Ascent grew out of a series of conversations among colleagues about how things could be done differently and, hopefully, better in the asset management world.

Putting Experience to Work

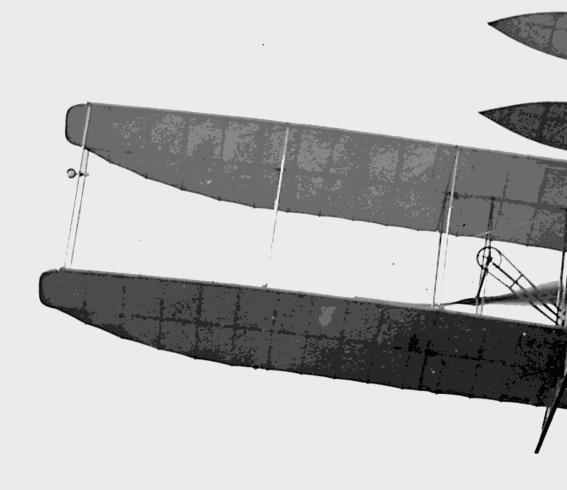
Before long, we were building on our ideas and forming an experienced team with a common mission:

- Start every conversation by asking, "What would be best for our clients?"
- Build and manage the best possible portfolios for long-term investors.
- Create clear, concise educational material to help clients become more successful investors.
- Structure and manage our firm with the goal of keeping fees and expenses low.
- Support the needs of our clients with a talented, dedicated group of professionals.

People are at the heart of First Ascent.

Visit firstascentam.com and watch "A Seasoned Team."

We look forward to working with you and your advisor.





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