

# OUR MISSION

Our mission is to deliver the highest level of comprehensive wealth management service, aiming to help you achieve your financial goals and ultimately establish a safe, secure future for you and your family.

# WHO WE ARE

## **An Experienced Team of Financial Advisors**

Spinnaker Investment Group, LLC is a privately owned, boutique investment company that cares deeply about its clients and is committed to helping them realize financial independence. The Spinnaker team has the autonomy to advise you on the best way to achieve your financial objectives by building strategies and portfolios that suit your personal goals.

## **Our Core Values**

- Trust - We value trust and strive to earn it from our clients through our transparency, competence and passion.
- Relationships - We value relationships and focus great energy on engaging and educating our clients
- Success - We value success and helping to drive financial independence for our clients, so they can achieve their goals

# OUR APPROACH

The Journey to Better Investing Starts with a Single Step

## **Goal-based Investing**

Spinnaker realizes that each client is unique and has individual goals. We take a holistic approach when looking at your life, expectations and goals to design an investment portfolio tailored to meet your objectives.

## **Portfolio Vigilance**

Since we are not employed by any institution and are an independent firm bound by the fiduciary standard, our approach demands we do what is best for you as a client. As your needs constantly change throughout the investment process, we continuously monitor, assess and adjust your portfolio with the aim of achieving the optimal results.

## **Financial Independence**

Spinnaker takes the stress out of investing by keeping your best interest in mind and working to help you achieve your personal investment goals. We work closely with you to develop your plan and aim to see that your objectives are being met. We work to help you gain confidence in knowing your portfolio is balanced to meet your present and future goals.

