ARTIFEX
ADVISORY GROUP

Why families choose Artifex Advisory Group

1. Relationship driven advice, and unique planning based on the individual. Nothing is cookie cutter.

2. As a licensed fiduciary we have our client's best interest at heart.

3. Holistic integrated planning and investment advice.

4. As a Registered Investment Advisor, we have more flexibility with investment options.

5. A family office environment.

6. Access to institutional investment strategies and alternative investments.

7. Accessibility - responsive to client's requests within 24 hours.

8. Multi-generational client relationships.

9. In-house independent research and investment due diligence.

Josh Elliott

President & Chief Executive Officer
Artifex Advisor Group, Inc.

Josh formed Artifex Advisory Group, Inc., a Registered Investment Advisor, to offer full-service, financial life-planning and investment advice to corporate executives, retirees, and families. The focus of Josh's practice is to assist in the stewardship of each client's financial resources by building trusting, long-term client relationships.

The personal, consultative approach Josh uses is centered on transparency, fiduciary duty, honesty and integrity. His advice encompasses the management of retirement savings, investment portfolios, stock options and bonuses, as well as charitable and legacy strategies.

Prior to moving to North Carolina from Los Angeles and establishing his own firm, Josh worked for 11 years as an independent investment advisor for various firms. He held numerous executive leadership roles in the Information Technology sector before launching his career in financial services. He graduated cum laude from the University of Southern California - the real USC. Josh is a dedicated husband and father of four adult children. After recently retiring from coaching high school football and winning 2 State Championships, Josh is looking forward to spending more time with his wife Kim adventuring around the world (as well as visiting his children who are scattered around the country) as well as serving in various church ministries in his free time.

Wealth Management Development Process

Step 1: Getting to know each other

- Learning about you, your vision, values and what's important to you.
- Understanding any special concerns/challenges
- What differentiates us in the industry
- Communicating our Process
- Discuss fees

Step 2: Discovery, proposal and plan

- Gather data, documents, and statements for analysis
- Analyze current investments
- Develop Strategy and financial plan

Step 3: Strategy Meeting

- Presentation of investment proposal & plan
- Complete risk tolerance
- Decide to implement solutions or discuss modifications
- Sign documents as needed
- Service model and technology overview

Step 4: Implementation of Investment Strategy

- Transfer existing assets
- Execute agreed-upon strategy
- Client account setup

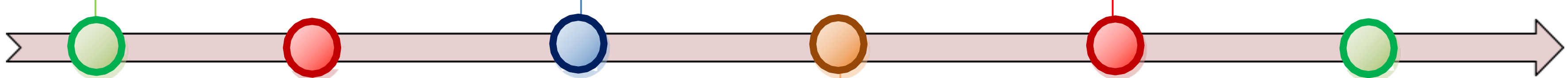
Step 5: Ongoing Review

- Regular performance and investment reviews
- Monitoring of wealth management plan
- Perpetual evaluation of our service
- Keeping up to date on life changes, needs, and objectives
- Schedule wealth management plan meeting

Step 6: Develop Wealth Management Plan

Coordinate with other advisors

- Retirement Planning
- Credit and Lending
- Insurance & Liability Management
- Education Planning
- Business Succession Planning
- Charitable Giving
- Estate Planning
- Family Dynamics



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