



PRIVATE PORTFOLIO

## Who We Are

Private Portfolio is a consortium of independent investment professionals who provide tailor-made financial guidance for our clients. We are registered representatives, foreign associates, bond traders, investment advisors, and money managers who use our individual and combined expertise to help our clients choose the best opportunities to both grow and protect their assets. We are committed to our clients, and to their success in achieving their long-term investment objectives.

## Services and Service

At Private Portfolio, we've been trading in global markets for many years. Our focus is on seeking out opportunity and personally helping our clients realize their goals, whether for capital preservation, growth, or income. We offer a broad spectrum of financial products and resources to fulfill your investment needs.

## Power and Support

Because of our clearing relationship with Pershing, LLC, our independent investment professionals have the freedom of choice they need to do what is right for their clients. Pershing, a leading global provider of securities processing and investment-related products and services, gives us support and broadens our capabilities.

[Pershing LLC, is an affiliate of The Bank of New York, one of the country's largest financial institutions.]

## Account Protection

Working on our behalf, Pershing provides account protection for the net equity of your securities position and cash in your account. Of that total, the Securities Investor Protection Corporation (SIPC) provides \$500,000 of net equity protection, including \$100,000 for claims for cash awaiting reinvestment. Pershing provides the additional protection on terms similar to SIPC for account net equity in excess of the \$500,000 through a commercial insurer.

[This account protection applies when an SIPC member firm fails financially and is unable to meet obligations to securities clients, but it does not protect against losses from the rise and fall in the market value of investments.]

## Best of Both

Private Portfolio has the technology, talent, and resources to help our clients invest wherever they choose. We offer you an ideal investment relationship: all the comfort of doing business with people who know you and care about your success, and all the support and security of Pershing, a powerful industry presence.

Call us for answers: 858.551.2071