



## 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 (Pershing), a BNY Mellon Company, 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. (BNY Mellon is one of the longest-lasting financial institutions in the world.)

## Account Protection

**Evaluation and Segregation of Assets** - Pershing protects client assets through rigorous internal control measures. **Securities Investor Protection Corporation (SIPC®) Coverage** - Pershing is a member of the SIPC, which protects the securities customers of its members up to \$500,000 (including \$250,000 for claims for cash). Explanatory brochure available upon request or at [sipc.org](http://sipc.org). **Excess of SIPC Coverage Through Underwriters at Lloyd's and Other Commercial Insurers** - In addition to SIPC protection, Pershing provides coverage in excess of SIPC limits from certain underwriters in Lloyd's insurance market and other commercial insurers.

## 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