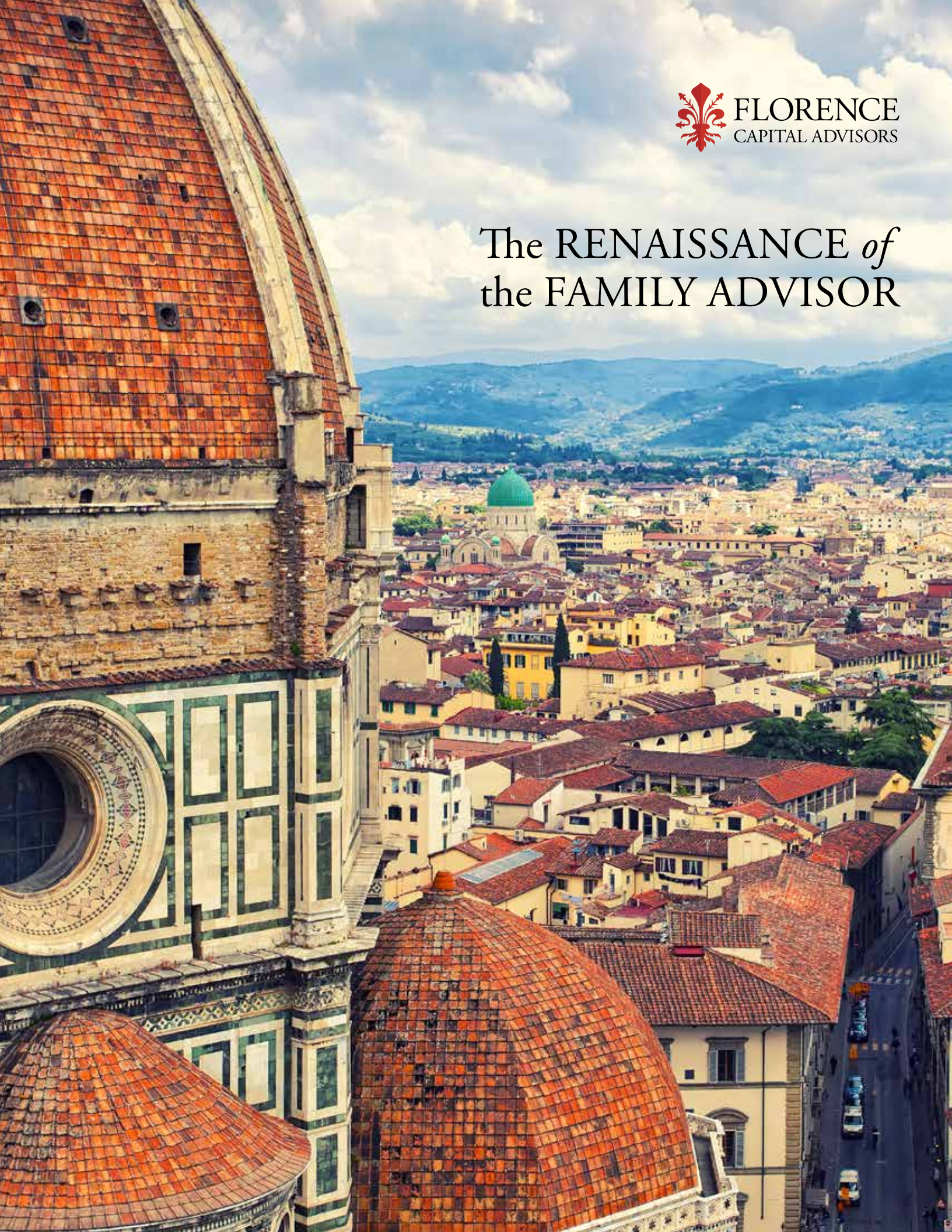



The RENAISSANCE *of*  
the FAMILY ADVISOR





# FLORENCE CAPITAL ADVISORS

ON OCTOBER 23, 2015, Florence Capital Advisors was born. Reflecting the spirit of Florence, Italy, birthplace of the Renaissance, Florence Capital Advisors is an independent wealth management and investment advisory firm dedicated to providing customized wealth management solutions. We strive to offer a heightened level of service and expansive range of thoughtful investment options to meet each client's broad and often complex needs. You're invited to review this brochure to learn more about the firm and why we are distinctively different in the world of wealth management and advisory services.

## ENLIGHTENED WEALTH MANAGEMENT

FLORENCE CAPITAL ADVISORS provides clients with highly attentive service as well as a unique – and expanding – selection of investment strategies that seek to preserve capital, create wealth and enable our clients to achieve their most important objectives. Leveraging our extensive network, Florence Capital strives to be a thought leader in offering clients an enlightened approach to wealth management.

### Why have you launched the firm?

Florence Capital Advisors was launched to ensure our valued clients receive the highest levels of service and performance. As an independent firm, Florence Capital Advisors has the freedom to source the most innovative opportunities available in the global marketplace. Without constraints imposed by corporate mandates or policies, Florence Capital Advisors can nimbly source investments, perform due diligence, and execute strategies in a more efficient manner, consistent with our clients' expectations.

### What are the benefits of the independent model?

Independence enables Florence Capital Advisors to offer objective advice and provide clients with access to a comprehensive array of investment offerings. We have entered into strategic partnerships allowing for unfettered access to many of the industry's leading products and services. As your fiduciary, we have the ability to source improved lending solutions, access industry specific investment banking expertise, and implement thoughtful asset management, risk mitigation and estate planning strategies.

INDEPENDENCE *fosters*  
UNCONDITIONAL OBJECTIVITY,  
COLLABORATION *and* TRUST.

Does independence affect the financial services you offer?

Yes. Florence Capital Advisors utilizes an open-architecture platform, ensuring a wider range of wealth management solutions. Predicated upon rigorous due diligence, we are free to offer the most attractive – and unique – opportunities in areas such as tax-efficient investing, private equity and liquidity planning.

Will your investment approach be impacted by independence?

Independence allows Florence Capital Advisors to implement its investment approach with more options and fewer constraints. With nearly 15 years of experience, Founder and CEO Greg Hersch has established himself as a trusted advisor, offering proven expertise for clients seeking to achieve their long-term growth objectives in addition to preserving wealth in challenging markets. Our investment approach remains committed to the core principles that have served clients well: simplicity, rigorous due diligence, a long-term perspective and collaboration with the client. Prudent risk management, unbiased macroeconomic research, attention to behavioral finance principles and ongoing analysis of asset price valuations continue to be the cornerstones that drive the investment and asset allocation process.

Where will my assets be held?

As a registered investment adviser, Florence Capital Advisors will not hold your assets. We have selected **Pershing Advisor Solutions LLC** as custodian. Pershing's state-of-the-art technology, highly reliable and scalable infrastructure, host of innovative products and services and dedicated client model make it a compelling partner for us and an outstanding custodian for your assets. In addition to streamlined reporting, Pershing offers a full global custody platform with services such as online multicurrency reporting, portfolio accounting and proxy services. It is an affiliate of Pershing LLC, the industry's largest clearing provider, whose parent, BNY Mellon, is the largest custodian in the world with \$28.5 trillion in assets under custody and/or administration (as of March 31, 2015).

*A new firm with* HEIGHTENED CAPABILITIES,  
BROADER ACCESS TO UNIQUE *and*  
GROWING INVESTMENT OPPORTUNITIES  
*and* STEADFAST DEDICATION TO OUR CLIENTS.

Does the custodian offer banking and cash management services?

Yes. Pershing offers a broad selection of accounting and reporting services including direct deposit, online bill pay, customized operational alerts, online access to detailed account information and online cash management. In addition, Pershing offers in-depth reporting including cost-basis recordkeeping, realized gain or loss data, electronic delivery of statements, trade confirmations and tax reporting. As a client, you have full access to these services when you open your account with the custodian.

Will there be regulatory oversight of my assets?

Yes. In addition to being registered with the SEC and subject to strict rules regarding its fiduciary responsibility, Florence Capital Advisors is also subject to the rules and regulations governed by FINRA.

How does an independent firm provide comprehensive services?

As an independent firm, Florence Capital Advisors has the freedom and ability to enter into strategic partnerships based solely on our clients' needs. We have chosen to partner with services providers capable of creating the elite client experience Florence Capital Advisors seeks to provide. In addition to partnering with Pershing for custodial services, we are collaborating with **Winged Keel Group**, an independent life insurance brokerage firm and leader in creating and implementing customized, multi-generational wealth accumulation and wealth transfer strategies for ultra-high net worth families. We have also teamed with **Black Diamond**, an award-winning, cloud-based portfolio management platform tailored to wealth advisors. Black Diamond offers asset aggregation, customizable reporting, rebalancing and fully outsourced daily reconciliation and data management services. As a result, clients have online access to their complete wealth picture.



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