



*Helping families build a lasting legacy.*

# ABOUT



Bison is a boutique wealth management firm backed by a multibillion-dollar single family office, established with the principle that individuals and families can benefit from the knowledge, experience and creativity of our founders and partners.

The core tenets **plan**, **protect** and **prosper** frame the Bison approach to wealth management.



## OUR MISSION

Bison considers each individual, family or business' unique needs when designing and implementing your plan. Our ability to listen and capture what matters most is what enables us to create innovative client solutions. We curate sophisticated investment strategies, custom cash flow analysis, and advanced estate planning so each family can focus on building their lasting legacy.

# PLAN



*“Give me 6 hours to chop down a tree and I will spend the first four sharpening the ax.”*

*- Abraham Lincoln*

We believe proper planning is the single most important ingredient of wealth management and, arguably, the most neglected. A good **plan** is the roadmap to a successful financial journey. We customize your plan with the goal of ensuring you arrive at your destination safe and sound.



## TYPICAL COMPONENTS

- ▶ Risk tolerance analysis
- ▶ Investment plan
- ▶ Income tax analysis
- ▶ Estate plan
- ▶ Business succession/exit plan
- ▶ Cash flow analysis
- ▶ Retirement plan optimization
- ▶ Executive stock plan
- ▶ Liability analysis
- ▶ Health/long-term care plan

# PROTECT



Most financial plans work well until the environment changes. Our plans are built with the expectation that things *will* change but the plan will still succeed. By evaluating the plan's vulnerabilities and failure points, we are able to identify future threats. This enables us to construct buffers and **protections** to help mitigate risks in an effort to achieve desired outcomes.

## RISK FACTORS

- ▶ Longevity
- ▶ Premature death
- ▶ Disability
- ▶ Bear market
- ▶ Health status
- ▶ Life changes
- ▶ Inflation



*“The four most dangerous words in investing are: ‘this time it’s different.’”*

*- Sir John Templeton*

# PROSPER



*“Opportunities come infrequently. When it rains gold, put out the bucket, not the thimble.”*

*- Warren Buffet*



The goal of a financial plan should not be to simply succeed financially. Wealthy families have already achieved financial success. Leaving a lasting legacy that transcends future generations is how a family truly *prosper*s.

## ACHIEVING PROSPERITY

- ▶ Legacy
- ▶ Family education fund
- ▶ Quality of life
- ▶ Charitable/philanthropic plan
- ▶ Longevity and vitality
- ▶ Family governance/dynamics

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Investment Advisory services are provided through Bison Wealth, LLC located at 3550 Lenox Rd NE, Ste 2550 Atlanta, GA 30305 or Bison Advisors, LLC located at 140 Cateechee Trail, Hartwell, GA 30643. More information about Bison Wealth or Bison Advisors and its fees can be found in their respective Form ADV Part 2, which is available upon request by calling 404-841-2224. Bison Wealth and Bison Advisors are independent investment advisers registered under the Investment Advisers Act of 1940, as amended. Registration does not imply a certain level of skill or training. All services referenced are characterized as educational in nature and should not be deemed as a solicitation of any specific product or service. Neither Bison Wealth LLC nor Bison Advisors LLC offers tax nor legal advice. Please consult with a tax advisor or attorney for advice regarding the overall impact on your portfolio. Bison Wealth and Bison Advisors offer guidance on many of the topics mentioned, including insurance services, strictly on a referral basis and leverages the advice of other seasoned professionals that offer such services as a part of an overall financial plan. All investments involve risk and a potential loss of principal. Past performance is not indicative of future results. Insurance services offered by third parties not affiliated with Bison Advisors, LLC, Bison Wealth, LLC or Bison Holdings, LLC.