Everest
Capital Partners

Advising in Your Best Interest

Presented to: Confidential

About Us

Firm

Everest Capital Partners is a boutique investment advisory firm dedicated to providing objective investment advice and tailored financial solutions to wealthy individuals and families through a personal and holistic approach. As a Registered Investment Advisor (RIA), we deliver a personal touch while having the resources of a global firm.

Purpose

Everest Capital Partners was born to **empower people to live better, dream bigger and create more impact** with a wealth management partner they can trust throughout their journey and across generations. From the first handshake to your next big win, our commitment is constant. Everest is with you every step of the ascent.

Vision

Everest Capital was founded with **the vision to set the gold standard** in the Investment Advisory Services industry by providing our clients with the best objective solutions for wealth management and preservation.

Values

We are **united and guided** by the following values:

- Ethical & Committed
- Prudent & Experienced
- Responsive & Reliable
- Collaborative & Adaptive
- Proactive & Motivated

Team – *Partners*

"The **preservation of wealth is a journey,** an ascent to a higher state of fulfillment and freedom. The financial decisions you make along the way impact what you've built and **your legacy for the future.** When you take the Everest path, **we're with you every step of the way."**

– Roberto de la Guardia & Jaime Maduro, Partners, Everest Capital Partners

Roberto de la Guardia
Partner

- Joined the industry in 1980 at Merrill Lynch International Private Client Wealth Services, where he worked in New York and was trained in London on investment management principles
- Transferred to Panama in 1981 where he served High Net Worth Individuals, Ultra High Net Worth Individuals and Financial Institutions until November 2013 when Merrill Lynch International was sold
- Ranked consistently among the most successful advisors in Merrill Lynch International Wealth Management
- Was invited to the Barron's Roundtable for International Advisors
- Co-founded Everest Capital Partners in November 2013

Jaime Maduro
Partner

- Graduated from The University of Miami with a Bachelor's Degree in Business Administration in 2003
- Joined the industry in 2004 at Merrill Lynch International Private Client Wealth Services, where he worked in Miami serving High Net Worth Individuals, Ultra High Net Worth Individuals and Financial Institutions
- Transferred to Panama in 2005 where he continued serving High Net Worth Individuals, Ultra High Net Worth Individuals and Financial Institutions until November 2013 when Merrill Lynch International was sold
- Acquired CIMA designation in November 2008
- Co-founded Everest Capital Partners in November 2013

Team – *Support*

Roberto de la Guardia Jr.

- Graduated from The University of Pennsylvania with a Bachelor of Arts & Sciences Degree in 2010
- Joined the industry in 2010 at Merrill Lynch International Private Client Wealth Services, where he worked in Miami serving High Net Worth Individuals, Ultra High Net Worth Individuals and Financial Institutions
- Joined the Miami Office Sales Management team in 2011 as a product specialist partnering with financial advisors on product inquiries, financial planning, advisor training, investment ideas and credit solutions
- Transferred to Panama in 2012 where he continued serving Private Clients until November 2013 when Merrill Lynch International was sold
- Joined Everest Capital Partners

Maria Teresa Gomez

- Associate Degree in Secretarial Science (Legal Secretary)
- 22 years of legal experience working as a legal secretary in a recognized law firm in Panama

Zulema Ricord

- Over 30 years of experience in the industry as a Senior Account Representative with ample operational knowledge
- Held operational and administrative positions with:
  - *Merrill Lynch:* Operations Supervisor and Registered Client Associate (two different tenures)
  - *BNP Paribas:* Back Office Supervisor
  - *Sterling Financial Investment Group:* Registered Client Associate and Back Office Controller
- Acquired FINRA series 7, Compliance and Principal Executive Panama licenses

Everest Value

Who We Serve

We cater to high net worth individuals and families seeking a wealth management and preservation partner capable of providing personal, independent and up-to-date advice. Your unique needs, from investment advice to legacy creation, are our daily focus.

Our Business

We design customized strategies to preserve and grow wealth, provide liquidity and administer complex estates across borders. We have a trajectory of being loyal to our clients and providing them with independent advice in any market environment.

Client Experience

Over three decades of industry experience have given us a deep understanding of financial products and affluent clients' needs. We understand wealth in all its intricacies and are able to manage and measure risk. Your assets gain incomparable care with us.

Research

Our available research delivers timely perspectives on the changing economic environment, helping our clients adjust and understand the latest economic and financial developments.

Services

Wealth Management

Trustee Services
(through our third party providers)

Retirement Planning

Cash Management Solutions

Liquidity Solutions

Wealth Transfer Planning

Access to Key Custodians

UBS

Pershing
A BNY MELLON COMPANY

Personal Touch.
Global Resources.

Comprehensive 5-Step Process

1 Evaluate

Understanding your objectives by listening and by gathering your financial information

2 Analyze

Examining your information to learn about your investment interests and style

3 Customize

Developing sound strategies designed to suit your objectives and risk tolerance

4 Implement

Applying tailored strategies drawing from a global selection of solutions

5 Assess

Regularly reviewing your situation to ensure your financial objectives are being met

Dedication. Objectivity. Expertise.

Investment Philosophy

Global Conservative Path

Your assets underpin your legacy, lifestyle and financial decisions. We understand how deep and broad the impact of your wealth, if properly preserved, can be. This is why our main goal is to preserve capital:

- We apply a conservative investment approach with a long-term focus on capital appreciation, and seize tactical opportunities if they present themselves and your risk profile allows for it.
- We take a global approach, by evaluating risk and opportunities across asset classes to achieve your financial goals while keeping volatility in check.

There is no formula or right answer for all in protecting and building wealth. By listening and asking the right questions, we reach the answer that's right for you. We can be as bold or as conservative as you want to be. When you entrust us with managing your wealth, we advise you with care and loyalty.