

What are the benefits of working with One Degree Advisors?

Organize your financial life

- Coordinate your finances into one plan
- Free up your time to focus on priorities
- Establish clear goals and a vision for the future
- Facilitate communication with your team of professionals (i.e. accountant, estate planning attorney)

Anticipate and prepare for your life transitions

- Address the future impact of your decisions
- Explore clarity around the next phase of life
- Construct a game plan for sustainably replacing income
- Prepare for the “what ifs” of life

Grow and preserve your wealth

- Utilize timeless principles that have served investors well over various market conditions
- Proactively manage tax-efficiency through asset location, tax loss harvesting, and tax-efficient investments
- Develop a big picture, goals-based approach to constructing portfolios
- Assess appropriate coverage in the event of loss
- Ensure your assets are properly titled

Coach forward progress

- Organize action checklists
- Track progress towards goals
- Explore new tools and concepts as life changes
- Encouragement to continue advancing

Maximize your impact

- Charitably give in a wise, purposeful and tax-efficient manner
- Teach strong money habits to the next generation
- Facilitate family communication
- Enjoy meaningful family retreats focused on your family’s values, mission, and vision

Tell you the truth

- Empower and educate to guide confident decision-making
- Simplify complex strategies