



MODERN ASSETS

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client services overview

Financial planning shouldn't be transactional—it should be transformational. Y



FINANCIAL PLANNING & INVESTMENT MANAGEMENT FIDUCIARY ADVICE ROOTED IN PROGRESSIVE VALUES

Financial planning isn't just about growing wealth—it's about intention. It's about having the freedom to live life on your terms, support causes that matter, and make financial decisions that reflect your values.

CREATE A PLAN – We help you identify what you truly want out of life and design a financial roadmap to get there. Our planning process is free from sales pitches and financial jargon —just honest, transparent guidance.

PORTFOLIO IMPACT: At Modern Assets, we believe that money is political. Where and how you invest shapes not only your future but the world around you.

Portfolio Impact Beyond Sustainability – Environmental impact is just the beginning. We help reduce exposure to companies and industries that conflict with your broader values—whether that means avoiding private prisons, weapons manufacturers, or businesses that actively fund regressive policies.

LIVE YOUR LIFE: Money is a tool for power, stability, and choice - not a source of stress. With a clear roadmap and an accountability partner, you'll have the confidence to move forward, adapt, and thrive—no matter what changes come your way.

Financial planning starts at \$5,000 annually.

Investment Management bundled with financial planning starts at 0.9% of assets managed by Modern Assets.



INVESTMENT MANAGEMENT A PORTFOLIO THAT REFLECTS YOUR VALUES & YOUR POWER

The financial industry loves to pretend money exists in a vacuum—disconnected from the environment, politics, and social structures that shape our lives. We reject that idea.

Your money has power, and the way you invest should align with your priorities—whether that means supporting a more just economy, funding companies with strong labor practices, or divesting from industries that don't reflect your values.

PORTFOLIO IMPACT: We don't just avoid the bad actors—we proactively seek out investments that align with progressive values, from climate resilience to social justice to worker advocacy.

THE MODERN ASSETS PLANET PORTFOLIO: This isn't just about ESG screens. Our investment strategy seeks to reduce fossil fuel exposure by 50% compared to traditional portfolios while maintaining similar performance and risk characteristics. Because building wealth shouldn't mean compromising on climate action.

INVEST WITHOUT THE GUILT – Too often, people feel investing forces you to choose between financial security and your values. You don't have to make that compromise.

The minimum account size is \$25,000, and the investment management fee starts at 1.25%.