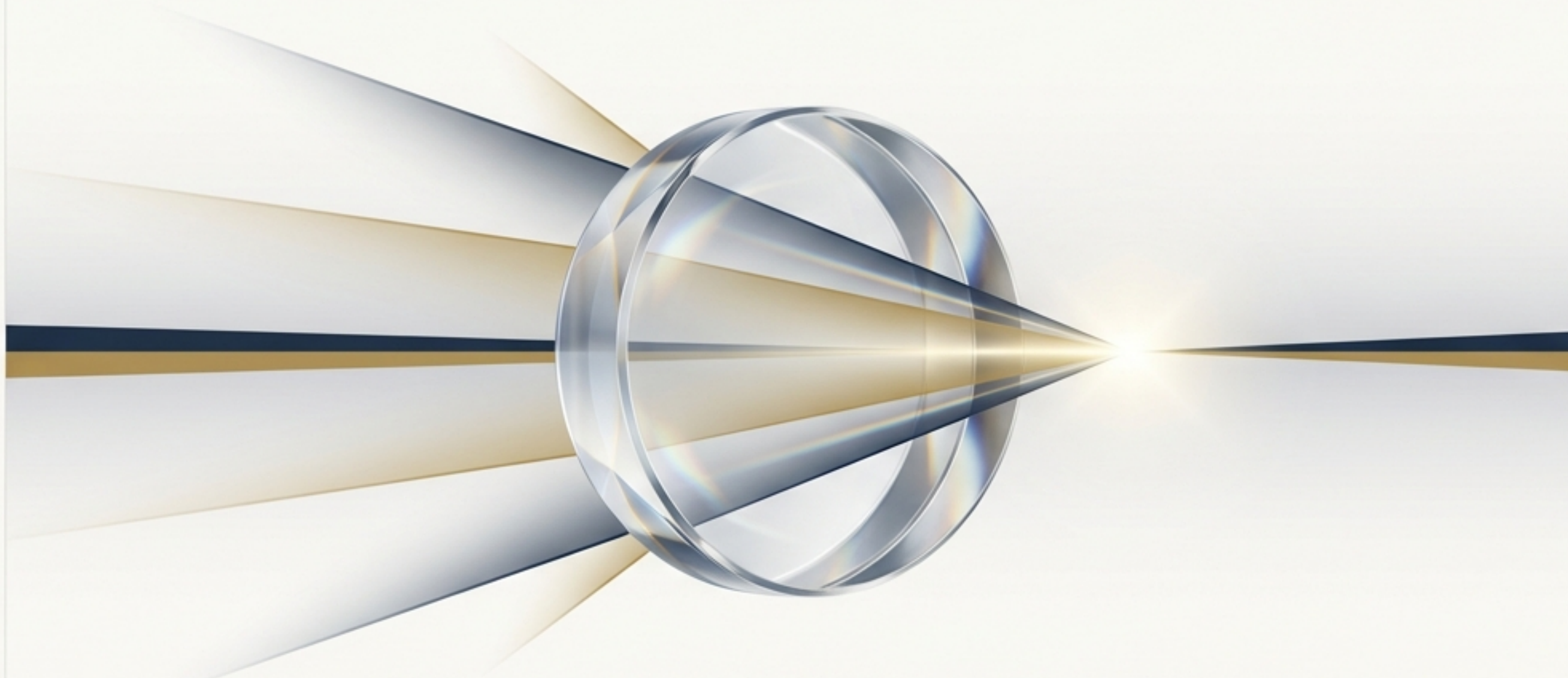



# See Your Future.

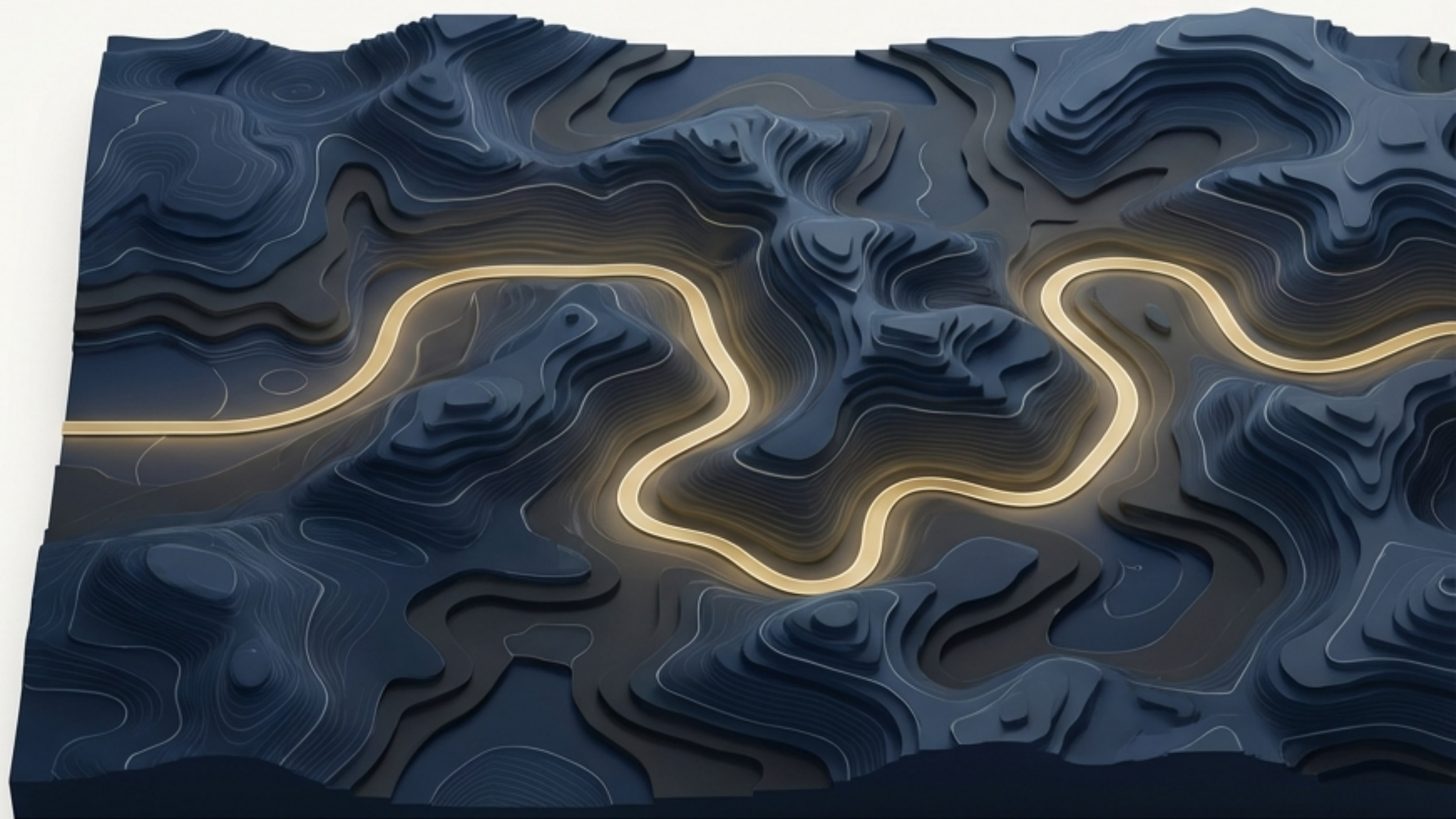


The Wealth Vision Experience

 Wealth Vision

# What if you could see your financial future before it happens?

Imagine making critical decisions about your business, family, and legacy with absolute clarity—seeing the real-time impact of every choice. This isn't about predicting the market; it's about eliminating uncertainty in your own financial world, allowing you to navigate your path with confidence.



# Conventional Wealth Management Has a Ceiling.

Successful people often hit a plateau with traditional financial advice. The experience becomes reactive and fragmented, failing to account for the total complexity of your life. It's a model that manages accounts, not your entire net worth.



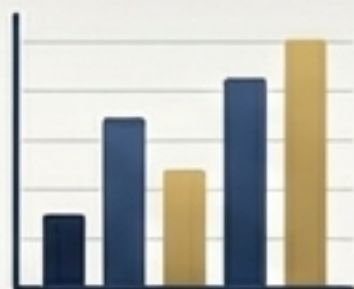
## Fragmented Advice

Your CPA, attorney, and advisor work in silos, creating tax inefficiencies and strategic gaps.



## Reactive Planning

Advice is based on what has already happened, not on proactively modeling your future.



## Focus on Returns Alone

Value is narrowly defined by investment performance, ignoring massive opportunities in tax, estate, and structural planning.



## Lack of Clarity

Complex strategies are presented in dense reports, not in a way that provides intuitive understanding.

# We Demolished the Ceiling. We Built a New Model.

We believe you deserve more than just wealth *management*. You deserve **Wealth Vision**.

Our approach is built on a powerful premise: when you can see your entire financial life with absolute clarity, you make profoundly better decisions.

We integrate every piece of your net worth into one dynamic, visual strategy, designed to transform uncertainty into confidence.



# Our Experience is Built on Three Pillars of Excellence



## Visualize Your Wealth

Transforming complexity into a clear, interactive financial blueprint.



## Amplify with Intelligence

Leveraging proprietary AI to uncover hidden opportunities and risks.



## Integrate Your Life

Serving as your family's personal CFO for a seamless, holistic experience.

# Pillar 1: Visualize Your Wealth

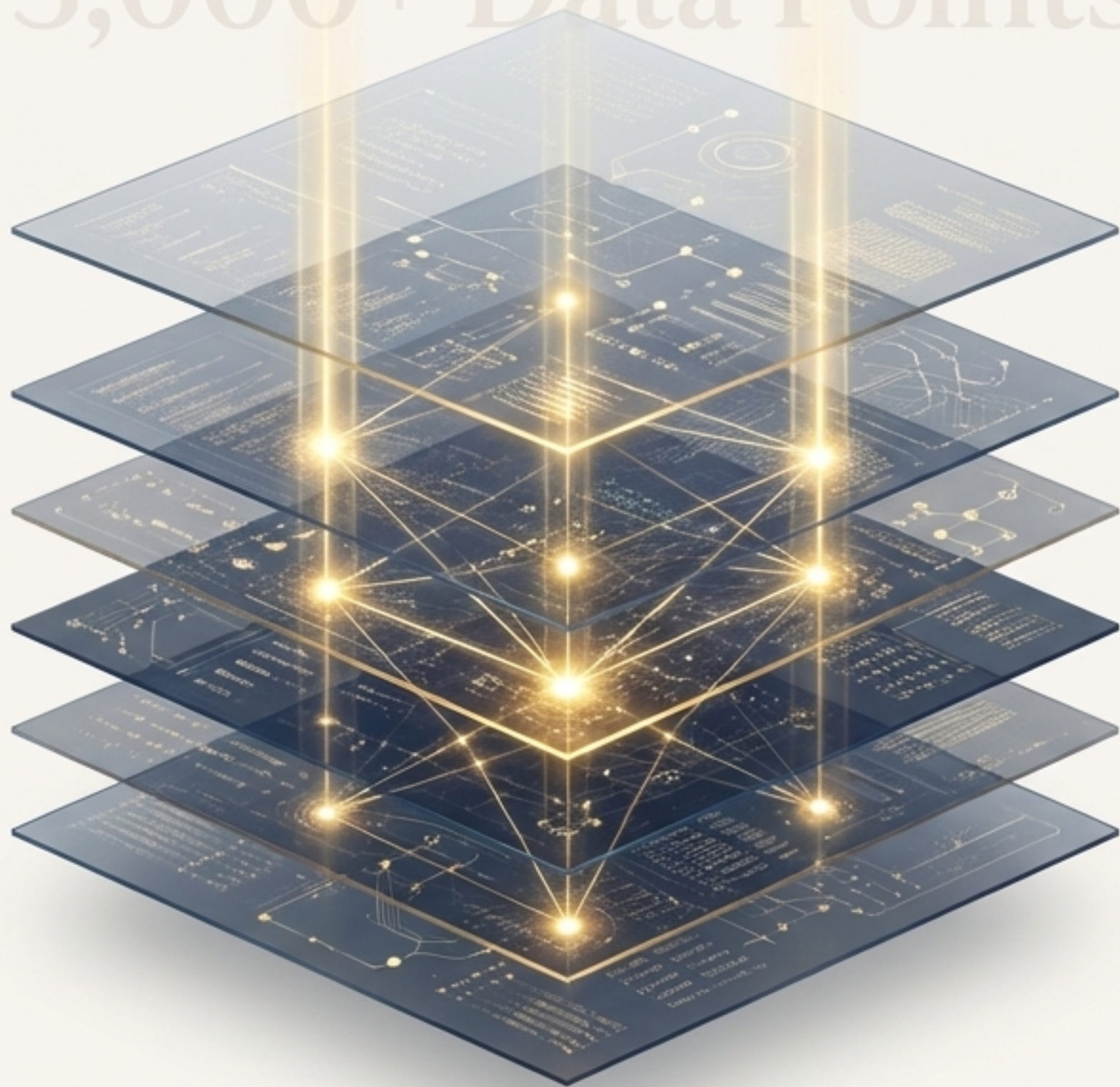
See the Impact of Decisions Before You Make Them.

We replace static reports and confusing spreadsheets with a dynamic, interactive financial map of your entire net worth. Our proprietary Wealth Visualization technology allows you to:

- **Model complex scenarios in real time:** See how selling your business, funding a trust, or making a major gift impacts your entire financial picture.
- **Identify strategic gaps:** Instantly see where your tax, estate, and investment plans are misaligned.
- **Gain absolute clarity:** Understand the interplay between every asset and liability, transforming uncertainty into confidence.



# 3,000+ Data Points



## Pillar 2: Amplify with Intelligence

Proprietary AI That Uncovers What Others Miss.

Most firms use off-the-shelf software. We build our own intelligence. Our AI-driven platform analyzes over 3,000 data points per taxpayer directly from the IRS to deliver proactive insights. This allows us to:

- **Legally and Ethically Disinherit the IRS:** Identify sophisticated tax minimization strategies that can save clients six or seven figures, often before we even manage a portfolio.
- **Discover Forgotten & Held-Away Assets:** Our system finds dormant retirement and investment accounts, ensuring a truly comprehensive plan. (Source: TaxStatus)
- **Deliver Hyper-Personalized Advice:** AI uncovers patterns in your complete financial picture, allowing us to craft strategies that are as unique as you are.

\*Wealth Vision uses artificial intelligence tools to enhance research and analysis. All final advice is delivered by our licensed professionals.\*

# Pillar 3: Integrate Your Life

Your Personal CFO and On-Demand Financial Quarterback.

Managing significant wealth requires more than an investment advisor; it demands a dedicated team to coordinate your entire financial life. We act as your multi-family office, serving as the 'first call' for every major financial decision.



## Key Services

- ✓ **Seamless Professional Coordination:** We work directly with your CPAs and attorneys, ensuring your tax, legal, and investment strategies are perfectly aligned.
- ✓ **Holistic Balance Sheet Oversight:** From business succession planning and liability management to philanthropic structuring and risk management, we oversee everything.
- ✓ **Concierge-Level Service:** We simplify complexity for your family, handling the details so you can focus on what matters most.

# The Value of Advice Is Measured in Alpha, Not Just Returns.

Research shows that investors often undervalue the most impactful services an advisor provides. True "Advisor Alpha" comes from holistic strategies that optimize your entire net worth, not just investment returns.



\*Source: Adapted from Morningstar and Vanguard Advisor's Alpha research.

# The Advisory Industry Is Getting More Crowded and Less Efficient.

The traditional model is under pressure. Advisors are spending more for diminishing returns, and the value proposition of “comprehensive planning” has become diluted. This inefficiency creates an opportunity for a fundamentally new model.

**\$3,800**

The median cost to acquire a new client in 2023, a **75% jump** since 2021.

**0.6x**

The typical marketing efficiency. For every \$1 spent, the average firm generates only \$0.60 in new first-year revenue.

**88%**

The percentage of advisors who still rely primarily on client referrals—a tactic with diminishing returns that is difficult to scale.

Source: 2024 Kitces Report on How Advisors Market

# Guided by Experience, Driven by Vision.



## Erik Allison, Managing Partner

A visionary entrepreneur and venture capitalist with 15+ years in wealth management, VC, and risk management.

- Pivotal role at United Capital (acquired by Goldman Sachs for \$750M).
- Founder of Skytree Capital Partners (VC firm).
- **Focus:** Bridging finance and technology to architect innovative AI-driven financial solutions.



## Tyson Lokke, CFP®, Managing Partner

A Certified Financial Planner™ professional with deep technical expertise in holistic wealth strategy.

- **Focus:** Ensuring every client strategy is executed with systematic precision and adheres to the highest fiduciary standards.

\*Our partnership combines entrepreneurial agility with CFP® technical excellence.\*

# A Dedicated Partner for a Select Group of Clients.

We have deep experience helping high-achievers navigate the unique complexities and opportunities that come with success. Our family office model is designed for:



## Entrepreneurs & Business Owners

Unlocking value from your life's work, from scaling and structuring to succession and sale.

## High-Net-Worth Families

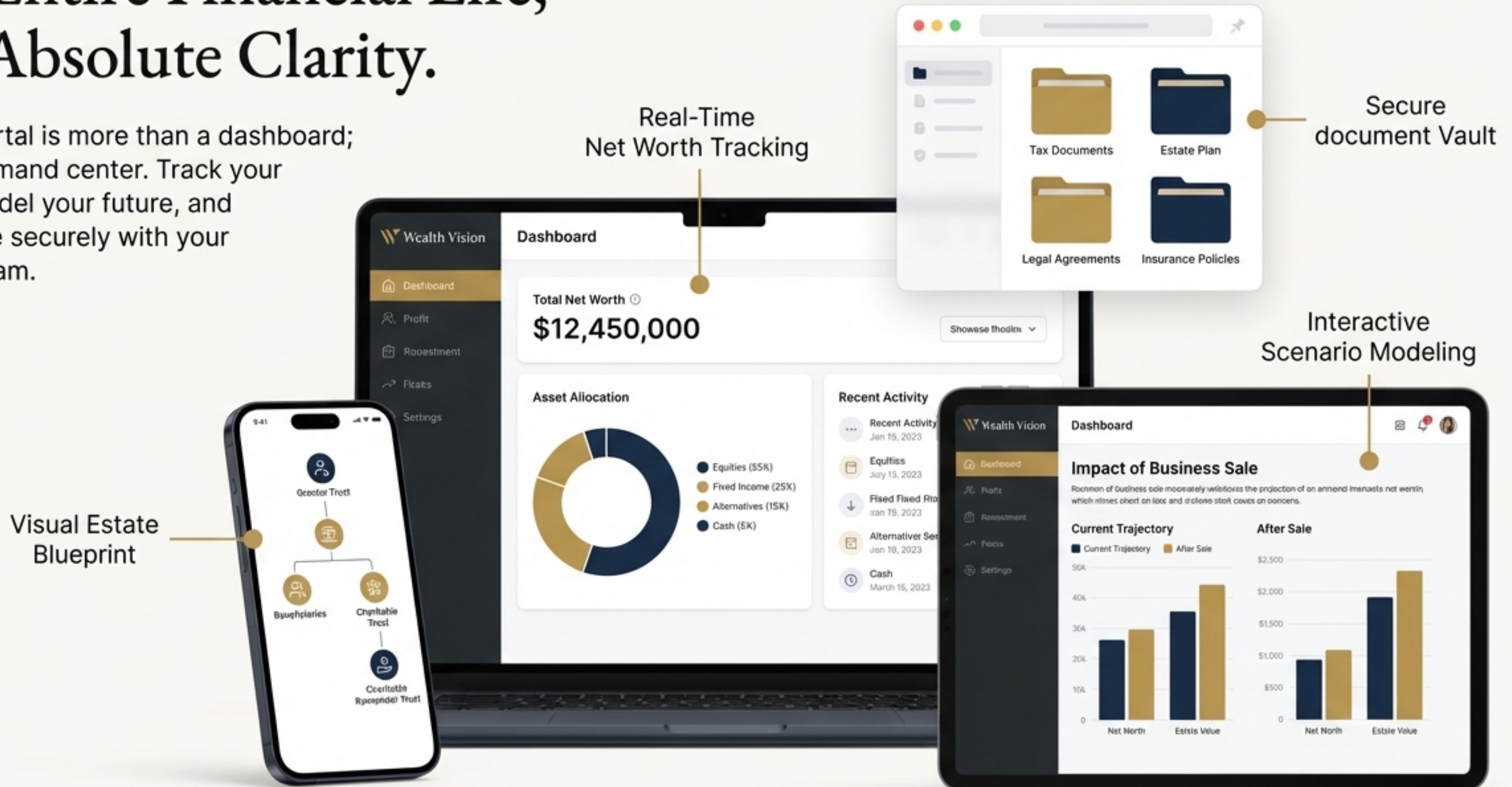
Preserving multi-generational wealth and providing for the people, causes, and communities you care about.

## Professional Athletes

Converting peak active income into lifelong wealth, managing business ventures, and navigating career transitions. (We proudly sponsor PGA Tour professional Nate Lashley).

# Your Entire Financial Life, with Absolute Clarity.

Our client portal is more than a dashboard; it's your command center. Track your progress, model your future, and communicate securely with your dedicated team.



# A Generic Example is an Idea. A Personalized Illustration is a Financial Blueprint.

The best way to understand the power of Wealth Vision is to experience it for yourself. We invite you to a complimentary and confidential discovery session where we will provide you with:

- ✓ A live demonstration of how our Wealth Visualization platform can model your unique financial situation.
- ✓ A complimentary tax analysis using direct IRS data to uncover potential hidden savings.
- ✓ An initial assessment of your current estate plan to identify key opportunities and risks.



# See Your Future.

## Wealth Vision

[www.wealthvision.ai](http://www.wealthvision.ai)  
[erik@wealthvision.ai](mailto:erik@wealthvision.ai)  
Erik Allison: (702) 215-9434



[tyson.lokke@savvyadvisors.com](mailto:tyson.lokke@savvyadvisors.com)  
Tyson Lokke, CFP®: (775) 412-3450

### Schedule Your Discovery Session

\*All investments involve risk, including potential loss of principal. Past performance does not guarantee future results. This material is for informational purposes only and is not investment advice without a formal advisory relationship.\*