VORA WEALTH MANAGEMENT, PLLC

INVESTMENT PHILOSOPHY

We Make Investment Decisions **Together.**

1 Portfolio Creation

Our investment philosophy is grounded in the belief that it should be aligned with your unique financial goals. Guided by your long-term interests, we personalize your portfolio according to your investment objectives, your timeline for achieving them, the rate of return required to fund your needs and the appropriate level of risk you are comfortable with.

We then apply a coherent strategy for allocation among broad categories of assets to ensure preservation of capital, provide downside protection and generate income from market upswings.

2 Implementation of Portfolio Design

Once we've determined weightings in each specific asset class, we then select portfolios based on your unique expectations and situation. We seek out the best investment options to maximize your portfolio objectives while minimizing the associated risks.

In the broadest terms, your portfolio may consist of three asset classes: Structured Notes, Exchange Traded Funds, and Equities. We will balance these asset classes in accordance with your investment plan, risk profile and market fluctuations. We've developed a variety of models to suit the needs of varying investors, risk tolerances, and investment goals.

3 Evaluation

Our Investment Philosophy combines time-tested investment discipline approaches with detailed industry analysis conducted by a professional portfolio management team that monitors your portfolios on many levels.

Once we implement your plan, you'll receive regular reviews and information regarding your accounts, ensuring you're making progress toward your goals. We'll also adjust your plan as you experience major life events or your goals shift.

Disclosures

Investment advisory services offered by Vora Wealth Management, PLLC, a SEC-Registered Investment Adviser.