

A hand is pointing at a tablet displaying a bar chart. The tablet is on a desk with a smartphone and some papers. The background is a blurred office setting. A blue vertical bar is on the left side of the image.

# NOLAN

CAPITAL ADVISORS LLC

We take  
the complex  
and make it  
***SIMPLE.***



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## Who We Are

*We make the complex process of retirement and estate planning simple, so you can focus on what's important.*

Our team's priority is helping you take care of yourself and your family. We want to learn more about your personal situation, identify your dreams and goals, and understand your tolerance for risk. Long-term relationships that encourage open and honest communication have been the cornerstone of our foundation of success. We're committed to providing you with the highest level of service and attention, and we look forward to working with you to achieve your financial goals.

**Philosophy:** You're not just a number to us.

We take the time to get to know you and your unique story. Your values are important to us, and we want to make sure they are reflected in your financial plan. A well-crafted plan that is tailored specifically for you can help you achieve your future goals. We want to help you get there, and our team of experienced professionals is here to do just that.

## Our Team

BRIAN NOLAN - President & Partner

ROLAND J. CASTANO - Partner & Executive Vice President



**OVER 20 YEARS OF EXPERIENCE!**



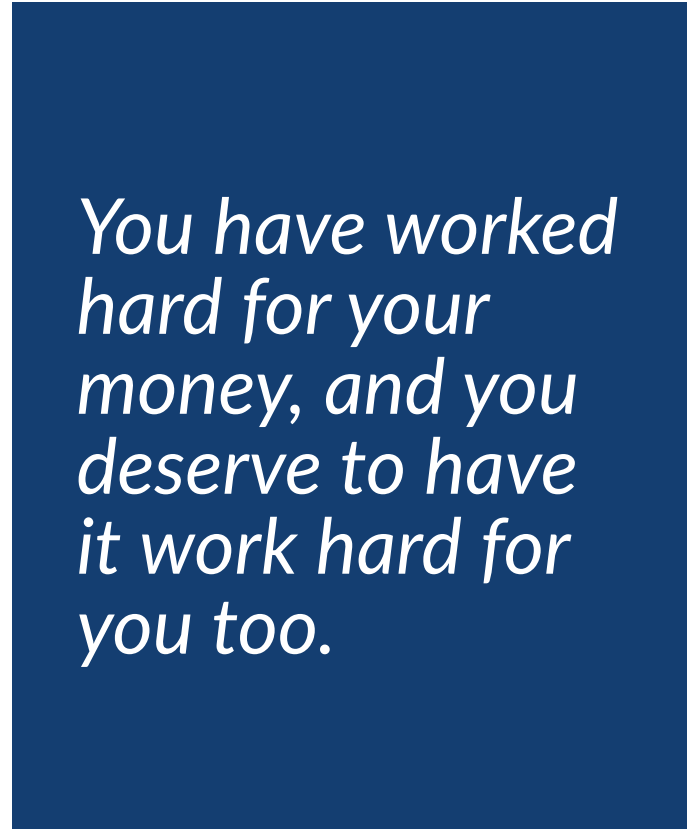
## What We Do

### Our Process

Nolan Capital Advisors is a professional firm that specializes in helping individuals make the most of their money through wise investments. We use a Four Pillar Approach and a focus strategy so you can feel confident your money is being managed with both your short-term and long-term goals in mind. You deserve a team who puts your interests first. With Nolan Capital Advisors, you'll have access to comprehensive financial planning and investment advice that is tailored specifically for you.

### The Strategy

- 1) Our strategy is designed to help you minimize risk and maximize growth potential so you can retire with the lifestyle you deserve. We'll work with you to create a personalized plan that fits your unique needs and goals. And we'll be there every step of the way to make sure you stay on track.
- 2) We know it can be difficult to think about the future but planning for death is one of the most important things you can do for your loved ones. With our help, you can make sure they're taken care of even after you're gone.



*You have worked hard for your money, and you deserve to have it work hard for you too.*



# How We Do It

## OUR FIVE POINT PLAN

1) Our investment firm likes to sit down and have a conversation with our clients. We want to get to know you on a personal and professional level so we can best help you achieve your desired outcome. We will discuss at length your goals, challenges, and objectives as well as your experience and risk level as an investor. It is important to us we understand what it will take to achieve your goal so we can provide you with the best possible service. We believe by getting to know our clients, we can better help them succeed.

2) At Nolan Capital Advisors LLC, we take a comprehensive approach to investment planning. We will work with you to understand your unique financial goals and risk tolerance. We will then examine all the available information and options to develop a customized investment plan that meets your needs. We believe this approach leads to the best possible outcomes for our clients. By taking the time to fully understand your situation and objectives, we can develop an investing strategy tailored specifically for you. This customized approach allows us to capitalize on opportunities and minimize risks, helping you to achieve your financial goals.

3) After Nolan Capital Advisors LLC presents and explains our recommendations in detail, you will play an important role. We will give you some time to review before making a commitment. After your approval, we will execute the customized strategy recommendations. Our team is experienced in implementing a wide variety of investment strategies, and we will work closely with you to ensure that your goals are met. We understand every client is unique, and we will tailor our approach to fit your needs.

4) We believe diversification is key to achieving long-term investment success. That's why we practice Modern Portfolio Theory, which seeks to maximize returns and minimize risk through asset diversification. In this step, we will compile the data gathered and design and customize a well-diversified investment portfolio that meets your unique needs and goals. Keep in mind, investing involves risk, and you may incur a profit or loss. However, we believe with a diversified portfolio, you will be better positioned to weather market volatility and achieve your long-term financial goals.

5) Your investment strategy is only as good as your ability to stick to it. That's why we believe one of the most important aspects of our job is to help you stay the course. We will work with you to customize an investment plan that meets your unique needs and objectives, and then we will help you to stick or modify the plan. We will monitor the markets and your portfolio on a regular basis, and we will make any necessary adjustments to keep you on track. In other words, we will help you stay the course even when the markets are volatile, and life throws you a curveball. With our help, you can rest assured that your investment strategy is always working hard for you.





*“We help our clients plan for their futures by doing what we love—giving them the support they need to achieve their dreams.”*



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