



## FEDERAL AND STATE TAX-FREE\* MUNICIPAL BONDS

High tax-bracket investors should explore the advantages of tax-exempt municipal bonds. California residents can especially benefit from the state tax exemption as well.

McClurg Capital has a long history of significant participation in the California municipal bond markets. Our clients benefit from our intimate knowledge of California issuers.

So, before you leave for Texas or Nevada call or email for FREE information on current bond offerings at:

415-472-1445 OR

[Invest@mcclurgcapital.com](mailto:Invest@mcclurgcapital.com)

\*Municipal bonds may be subject to alternative minimum tax.

## FULL SERVICE BROKERAGE

### Investment Solutions

McClurg Capital affords investors the choice of how they pay for investment guidance and implementation. Clients may choose to utilize our Full-Service Brokerage on a traditional, pay-as-you-go commission basis, or elect a fee-based solution through our Registered Investment Advisory where we are compensated based on a modest percentage of the assets in your account.

McClurg Capital is staffed with tenured professionals with specialties in growth and income securities, Tax-exempt\* municipal bonds, corporate and treasury bonds, mutual and exchange traded funds, and annuities.

Our full-service brokers are compensated by commissions only when our client is satisfied with the appropriateness of a recommendation and initiate a transaction. As an independent, boutique firm, our success depends on repeat business with satisfied clients. You may be assured that all our efforts are dedicated to the success of your investments.



**MCCLURG CAPITAL**  
CORPORATION

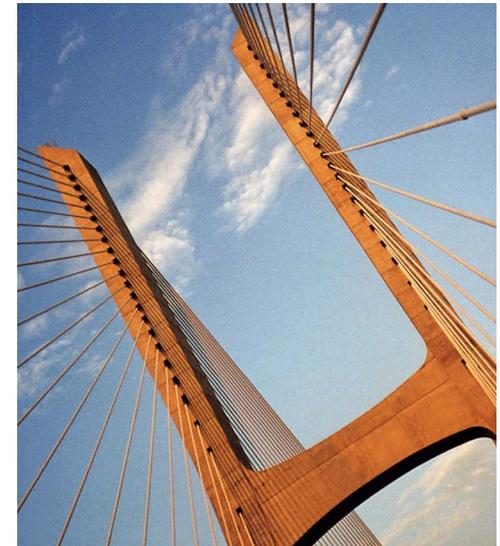
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**MCCLURG CAPITAL**  
CORPORATION

*Registered Investment Advisors  
Serving Discerning Investors  
Since 1985*



**Investment Management**

•  
**Tax-Free\* Municipal Bonds**

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**Full Service Brokerage**

**MEMBER**

Securities Investor Protection Corporation  
Financial Industry Regulatory Authority



**FINRA**

# Registered Investment Advisors

## A Partnership in Performance



**Private Investment Management** is offered to those busy clients who desire the convenience of McClurg Capital's investment advisory services. Clients may select management styles tailored to their specific investment objectives. We do the rest.

And along the way, we will keep you informed with performance measurements and reports, so that you'll know you're getting your money's worth.

**Asset Allocation** – Serious investors frequently wish to diversify their investments with different categories of securities i.e. stocks bonds, real estate, CD's, and exchange traded funds. Asset allocation among classes increases diversification and helps us manage risk for you. Clients may choose specific portfolio types or allocate a blend—all in one unified account.

## Strategic Services

McClurg Capital welcomes serious investors with high expectations. Invest a few minutes and let's talk. It may prove to be one of your best investments.

**The Performance Portfolio** invests in the common stocks of some of the world's best managed corporations for those clients seeking maximum returns through growth of dividends and capital appreciation. This portfolio may be perfect for younger investors and transgenerational assets.

**The Income Generator** is structured for clients seeking to maximize income from a portfolio of high quality corporate bonds, real estate investment trusts, CD's, and preferred stocks. This approach is ideal for retirees and those approaching retirement.

**Tax Freedom Portfolios** are designed for clients whose objective is to maximize tax-free income from a portfolio of tax-exempt\* municipal bonds, while preserving principal. The Tax Freedom Portfolios are designed for high earners and top-bracket tax payers.

## Your Benefits

The satisfaction of starting a program for you and your family's future financial security.

The comfort of knowing that your portfolio is under constant professional supervision.

The contentment of knowing your portfolio is diversified among high quality stocks and/or bonds.

Portfolios managed for minimum tax burden.

Freedom from day-to-day decision making.

The security of independent custodial services by the Pershing division of the Bank of New York Mellon.

We will save you time and money, and keep you informed all along the way.

*\*Municipal bonds may be subject to alternative minimum tax. Bond prices generally fall as interest rates rise. All portfolios have a level of risk associated with economic and market changes. Diversification does not guarantee investment returns and does not eliminate the risk of loss. Securities are not FDIC insured, not bank guaranteed and may lose money. There can be no guarantee of the attainment of the goals and objectives of an investment strategy.*

*McClurg Capital is compensated by commissions or fees based on a percentage of assets under management. The fee includes investment advice, asset allocation, daily portfolio management, and performance measurement. Please see our website for our management fee schedule, privacy policy and other important disclosures.*