

INVEST IN YOUR FUTURE WITHOUT COMPROMISING YOUR VALUES
HUMANE / ETHICAL / ENVIRONMENTALLY FRIENDLY / VEGAN

INVESTMENT PORTFOLIOS THAT REFLECT YOUR VALUES

OUR ORIGINS

Founded in 1995 by Brad Pappas, Optimized Partners is the **first and only registered investment advisor focusing exclusively on the needs of the socially responsible and humane investor.**

We manage taxable and trust accounts for families and individuals as well as established IRA's, 401K rollovers and assets for non-profits.

Optimized Partners

- Manages client assets based in the U.S. and for foreign investors at Charles Schwab Institutional Services and Interactive Brokers
- Represents a viable alternative to mass marketed mutual funds where the client can have direct influence in how their portfolio is managed

OUR STRENGTH

Optimized Partners employs proprietary investment rank and trading systems for the goal of delivering returns above major market indices and index funds.

We believe in an All-Weather investment approach that aligns client portfolios with the state of the economy and monetary policy. The benefit to the investor is to preserve the value of their account when early warning signs of recessions are visible thus avoiding high-risk recession induced bear markets.

During periods of economic expansion our client portfolios are only invested in securities that pass our stringent socially responsible/ethical criteria and also rank in the top percentile of our ranking systems. Our rank systems have been back-tested for a minimum of 15 years and designed to deliver above average returns with market-level risk.



Socially Responsible Investing Trailblazer

Created the "Cruelty Free

Investing" concept while

he was a broker with A.G.

Edwards and Sons in 1990

and the first formal humane

screen for Gretchen Wyler

and the Ark Trust host of the

Genesis Awards.



OptimizedPartners

GreenInvestment.com | 303-747-0500



HELPING PEOPLE INVEST IN SUSTAINABLE COMPANIES FOR OVER 20 YEARS

THE OPTIMIZED PARTNERS DIFFERENCE

- Contrary to mass marketed funds we are **highly responsive and accessible**. You have access to us via phone or email—we respond to every communication expeditiously
- We do not work on commission but on a flat-percentage of the assets, which gives us the **incentive to grow client accounts and preserve them in down years**
- We do not take custody of client assets **we use Charles Schwab Institutional and Interactive Brokers as custodians** for client assets
- Registered since 1995, Optimized Partners has a **clean regulatory history**
- We **help you every step of the way**—providing you with all necessary documents as well as assisting you with completing the Charles Schwab documentation

>> To see a live demonstration of the effectiveness of our proprietary systems, visit optimizedpartners.com and click on the Collective 2 links from the homepage.



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