Evanston Advisors

From the beginning, it's been about people.

Evanston Advisors always has focused on helping people get what they want out of life. We were founded more than 25 years ago to offer advice to business owners and others facing life transitions; we were a fee-based firm, so we could provide unbiased, customer-centered advice. Evanston did not offer investment management until years later, after many clients asked the firm to help them invest their money. They valued the advice they had received from us, but just as importantly, they valued the relationship of trust. At Evanston, we continue to believe that getting to know you, and letting you get to know us, is the best way for us to help you build a better life.

We understand that wealth is a tool, not an end in itself.

We want to participate in making your success happen.

Our financial advice focuses on you. We know your investment goal is not just to grow your money, but to ensure that you have the lifestyle you deserve. You want to provide not only for yourself, but for your children and grandchildren, and for the causes you support. And you want to live life, not worry about your finances.

Evanston Advisors helps you achieve those goals by holding to three basic principles:

- We believe in building relationships based on trust. We want to understand your goals so that we can help you achieve them.
- We believe in honest communication. We listen to what you say, and we tell you what we think.
- We believe that we have a fiduciary duty to act always in your best interest. We are answerable only to you, and we never make money from selling you a specific investment product.

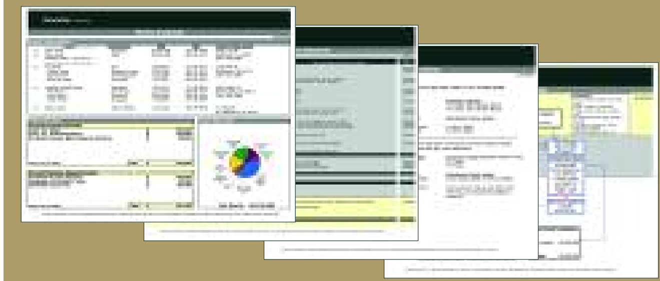
It’s like having your own personal CFO.

Every successful family, like every successful business, needs its own CFO – someone to oversee its financial life. Evanston Advisors wants to be the CFO for you and your family. We will give you objective, professional guidance and make sure that all the elements of your financial picture work together and in your best interest. We are committed to:

- Understanding your whole financial world, and each of its parts. We stay on top of things for you, so that you can focus on living your life and enjoying your success.
- Coordinating and working with your financial service professionals, including CPAs, attorneys, insurance professionals and more. If you need help finding such professionals, we can make referrals.
- Providing you with unbiased advice on all your financial decisions – always considering the tax and lifestyle impact of those decisions.

FPS™ shows where you are, where you’re going.
Evanston’s unique Financial Position Summary™ (FPS™) works like the GPS in your car – it shows you where you are. We gather all the aspects of your financial life, from the names and addresses of your kids to the particulars of your holdings, and put them together in a comprehensive, easy-to-read format that makes it simple to understand where you are. And that makes it easier for you to get where you want to go.

Sample Financial Position Summary™



Our core services include:

PA Portfolio Advisor

We can evaluate investment decisions made by any firm you choose. But we specialize in direct investment management. We create customized portfolios that match the reality of your life using individual stocks and bonds supplemented with mutual funds, ETFs and separate accounts. We don’t believe in one-size-fits-all investing, because we know that each of our clients is one of a kind.

EP Estate Planning

You have a lot of life to live, but you want to take care of the people and causes you support. We design and maintain estate plans that match your goals. And when your situation becomes more complex, we help you design and implement sophisticated strategies using trusts and other methods for transferring wealth.

FO Family Office

As your wealth expands, you may want help managing your financial life. We can do everything from administering your trusts to balancing your checkbook to keeping your insurance straight to organizing family retreats and more. We handle the details so you can focus on enjoying life.

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