NAPLES GLOBAL ADVISORS

CASE STUDY

Extraordinary Service for Extraordinary Clients

Real-life event. Client name has been changed.

The background.
After losing the love of her life and husband of over 60 years, Bonnie was newly widowed and unequipped to navigate the decisions ahead of her. Not uncommon for the generation, Bonnie's husband had exclusively handled their financial and business matters throughout the years, and she needed help sorting through the myriad of paperwork involving bank accounts, trust accounts, and insurance policies. Bonnie also sought assurances she had enough to live on and to fulfill their planned family legacy transfers.

At the recommendation of a friend and existing Naples Global Advisors (NGA) client, Bonnie engaged NGA to guide her and to help with the management of these financial assets. What she could not have imagined was the level of commitment and service she would receive that would extend far beyond the role of investment advisor.

Our personalized approach.
Our initial priority was to evaluate her investments to 1) ensure an appropriate level of risk for her age and stage in life, and 2) identify and oversee the administrative tasks necessary in the estate transfer process that would alleviate her stress and make her life less worrisome.

Our NGA representative worked diligently to take on the heavy administrative tasks involved with retitling her accounts and consolidating several accounts into three. Once the asset transition was complete, we successfully reduced Bonnie's portfolio risk and ensured she understood her new investment portfolio. With each encounter, Bonnie was treated as we treat all our clients regardless of the size of their portfolio: with compassion, genuine concern, and the utmost respect.

As we proactively worked to anticipate and resolve her needs, Bonnie grew less weary and less overwhelmed. Through the

Navigating Life Transitions

Going the extra mile on our clients' behalf.

"I am so proud to be part of a company that provides clients with this level of personal service. Our clients know that there is and will always be consistency across our firm. Their stories and experiences are part of the foundation that will be carried forward to each subsequent generation. The peace of mind that comes with that means everything to our clients."

Sara Perkins
Principal and Advisor

process, we became far more than investment advisors. We became trusted friends.

Going the extra mile.

Our relationship with Bonnie is reflective of the relationship we have with many of our clients. We become like family. Our mission to do what is right for our clients extends far beyond the assets we manage. For example, we:

- Personally accompanied Bonnie to the bank to help her through the documentation that was needed after her husband passed.
- Sat with Bonnie at her home and helped her secure new homeowners insurance after her provider dropped her policy following Hurricane Ian.
- Escorted her to Costco to update her payment method on file after the store's credit card policy changed.
- Continually coach Bonnie on the prevention of fraudulent scams and minimize her risk by freezing or thawing her credit when needed.
- Provide trusted referrals when Bonnie calls in search of local services such as lawn care, pest control, auto servicing, or home repairs.

We extend this level of white glove attention joyfully. Not because we are contractually obligated to do so, but because we care. This life assistance may not have anything to do with the assets we manage or the investment management fee we earn, but it has everything to do with our clients' comfort, which is a far greater return than can be measured by any portfolio performance.

Much to our honor, Bonnie considers her NGA team as family. She brings her adult children into our office to meet us so that when it is time to transfer wealth to the next generation, it will be a smooth, compassionate, and comfortable process for her beneficiaries. Bonnie has learned firsthand how difficult that transition can be. But since partnering with NGA, she has also learned how simple we make it.

NGA Principal and Advisor, Sara Perkins, shares, "I am so proud to be part of a company that provides clients with this level of personal service. We are employee owned; we are partners. Our professional staff is stable, there is no service disruption. Our clients know that there is and will always be consistency across our firm. Their stories and experiences are part of the foundation that will be carried forward to each subsequent generation. The peace of mind that comes with that means everything to our clients."

With Naples Global Advisors, you gain not only an exceptional team of experienced financial advisors, but also a team of individuals with a heart and commitment to doing what is right on your behalf. Thank you for trusting NGA.

About Naples Global Advisors

Founded in 2011, Naples Global Advisors is an SEC Registered Investment Advisor serving individuals, families, trusts, retirement plans, and charitable foundations and endowments. As an employee-owned LLC, we operate as a fiduciary and manage clients' portfolios with transparency and accountability. Whether you have an established portfolio or are investing as a result of a life event, our team is consistently seeking ways to put the odds of investment success in our clients' favor.