



**BOX**  
**FINANCIAL**  
ADVISORS

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INVEST BEYOND  
STOCKS & BONDS



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DO YOUR **INVESTMENT STRATEGIES**  
ALIGN WITH YOUR VALUES?



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## OUR STORY

Box Financial Advisors is established as a stewardship-based financial planning firm. Our goal in helping our clients be better stewards provides you with peace of mind that the advice and counsel we give is truly in your best interest. As a registered investment advisor (RIA), our cost is based on assets under management and not on commissions. By focusing on stewardship, we are freed up to focus on your goals and values. Often times, paying down a mortgage or giving a large gift to your church is the best use of your money, and our structure removes any conflicts of interest to offering such recommendations. Box Financial Advisors has intentionally been organized to safeguard the purity of our counsel.

Our structure as an RIA enables us to provide advice and recommendations in areas that are often overlooked and ignored by others in the financial industry. Social Security decisions, 401(k) allocations, benefit elections, mortgage analysis and car-buying decisions are just a few of the areas where clients need valuable guidance.

Not only have we organized our firm to be positioned to advise in these areas, but moreover we desire to be included in these conversations. We know right decisions in these small areas lead to big differences over the long haul and serve to build and keep momentum in the right direction.

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## OUR PHILOSOPHY



**PRINCIPLED** – We define a principle as a pillar of wisdom that is always right, always relevant, and does not change. The counsel we provide is based on such standards that are between 2,000 and 6,000 years old. These proven methods provide a solid foundation for your finances that don't change with the markets, interest rates, or economy. We begin with these established principles and then apply them using the latest financial tools and strategies available.



**STEWARDSHIP** – We work best with clients who share our values and view money as a tool, a trust and a test. A tool in that money in and of itself is not the goal, but rather the life and ministry that money will allow for you, your family and those around you. A trust in the sense that you are called to steward the resources entrusted to you, realizing that they are only temporary and ultimately belong to another. And finally as a test because money reveals the character of the person stewarding it!



**PRESERVATION** – We are a protection-minded firm. The counsel and advice we provide will always have a preservation bias. This is not to say we won't make recommendations to invest and grow your money, but in our mind the return OF your principle is more important than the return ON your principle. If you are looking to double your money every 12 months, we might not be the firm for you. However, if you are looking for proven strategies to aid you in having the finances available to accomplish the life you desire, we are your firm.

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“Give a portion to seven, or even to eight, for you know not what disaster may happen on earth.”

**KING SOLOMON ~935 BC**

# OUR CUSTOM APPROACH



Since 2010, Box Financial has helped clients participate in **102 private placement investments** in **32 different asset classes** totaling more than **\$97MM+ in invested capital**.

## OUR STRATEGY

Three components to return on  
**ALTERNATIVE/TANGIBLE ASSET INVESTMENTS**

### 1 UPFRONT IMPACT

- Create access or lower minimum investment amounts
- Reduced annual management fees, avoid or credit back sales commissions, and/or negotiate better terms

### 2 PERIODIC CASH FLOWS

- Monthly, quarterly or annual distributions

### 3 EXIT STRATEGY

- Capture appreciation on the sale or liquidation of the asset

## OUR BENEFITS

### ▶ SAVE TIME

- Leverage our sourcing, research, and due-diligence
- Less day-to-day involvement
- Expertise in self-directed IRA investing
- Coordinate with your tax advisor for 990T annual filing

### ▶ GREATER DIVERSIFICATION

- Less exposure to a single asset class
- Target annual cash flow of 5-8%
- Low correlation to stock/bond markets

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# FINANCIAL LIFE PLANNING



Our desire at Box Financial Advisors is to help you focus on what really matters in life: your plans, goals, and dreams. We recognize the truth that money is not an end in itself, but rather a tool that is to be used to accomplish the life and ministry you desire. So our advisors partner with clients to guide them in wisely stewarding their resources to help them attain this result. This is what we call “Financial Life Planning.”

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# RETIREMENT PLANNING



## ENJOY A FINANCIALLY SECURE LIFE EVEN AFTER YOU RETIRE

One of the biggest fears individuals have is about life after retirement. When to retire and how to make money last to enjoy a financially independent life are legitimate concerns.

At Box Financial Advisors, we offer a comprehensive and customized approach to retirement planning that goes beyond just managing your nest egg. Our financial advisors work with a focus to help you generate and build the equity that you need to support yourself and those dependent on you in a lifestyle that you want. With sheer confidence, your money will last your entire lifetime – regardless of how long you may live. Here’s how we help you navigate through, plan for retirement, and transition smoothly.

## IDENTIFYING AND SETTING RETIREMENT GOALS

Our advice is never one-size-fits-all. It’s always unique, case-by-case, and individualized. We identify goals so that you have a good vision for what you want your life to be after retirement. We answer questions like:

- What do you want to do after you retire (travel the world, raise grandchildren, maintain a luxury lifestyle)?
- How much will it cost you?
- When do you want to retire?
- Do you wish to spend all your money or pass on an inheritance to children or other heirs?
- Do you wish to leave a legacy or endowment or support philanthropic causes?

It is essential to understand that these factors, along with your current financial situation, will help us determine whether you should focus on growth, income, or a combination of both.

We believe that you shouldn't have to waste your golden years stressing over electric bills or the balance of your checking account. Let us help you enjoy life after retirement just the way you have envisioned. We have helped numerous people retire confidently. We can't wait to do the same for you.

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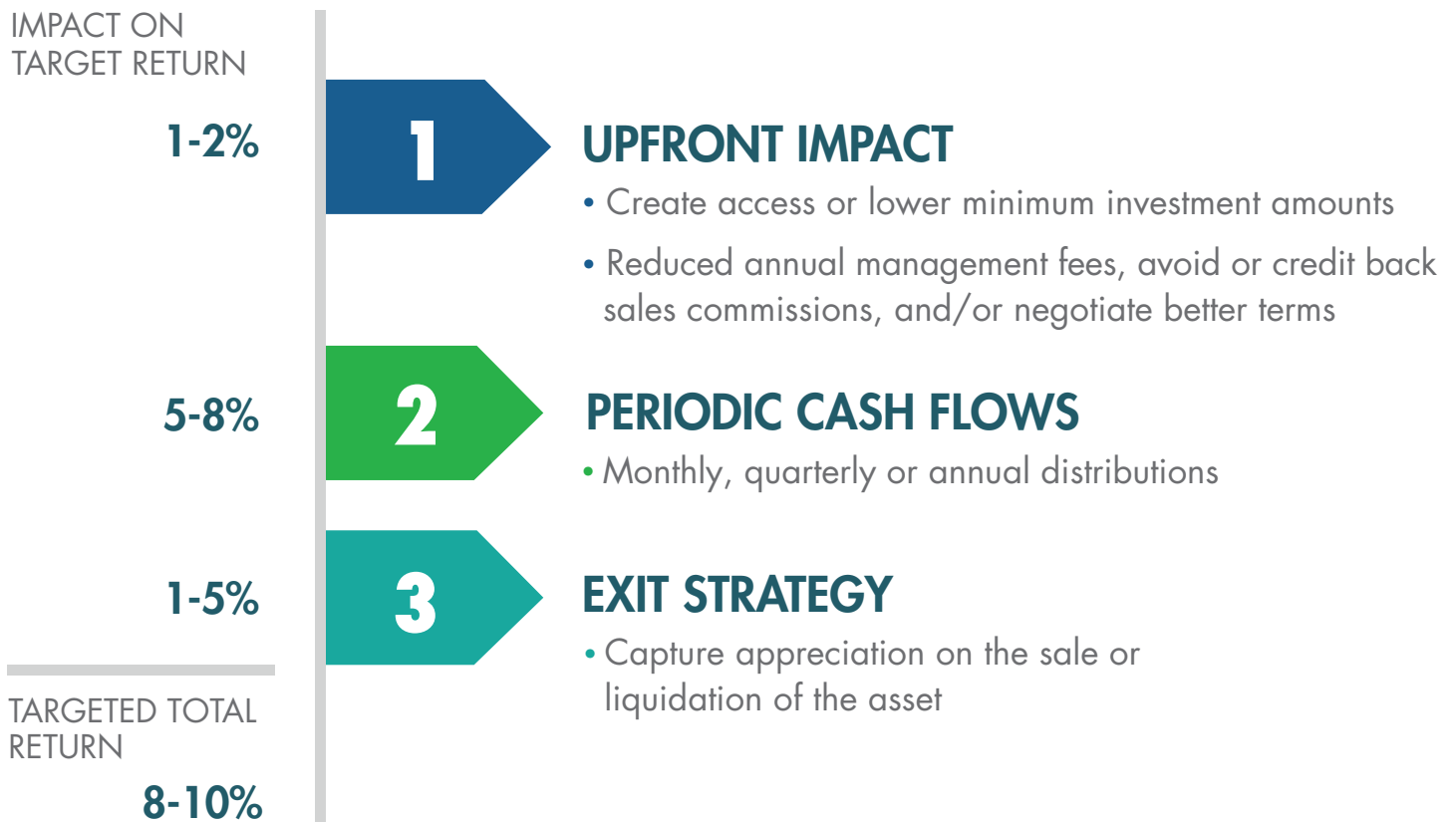


## INVESTMENT APPROACH: TANGIBLE ASSET INVESTMENT PROFILE

### WHAT IS AN **ALTERNATIVE/TANGIBLE ASSET INVESTMENT**?

**OUR DEFINITION:** Any direct investment in an asset or business through a private security that is not offered in over-the-counter markets. Ideally, the underlying investment should display a low correlation to the broad capital markets, have an inherently low volatility characteristic, and maintain a high probability of returning investor principle within 3-5 years.

### THREE COMPONENTS TO ADD VALUE FROM **OUR INVESTMENT APPROACH**



[www.boxfinancial.com](http://www.boxfinancial.com)

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