

THE KOVITZ CONSTRUCT

Wealth management firm **Kovitz** offers superb asset management, wealth advisory, and financial planning— with an emphasis on transparency.



Mitchell Kovitz, CPA, CFA®
Principal, Founder, Co-CIO



Ted Rupp
Principal, Co-President

Mitchell Kovitz, CPA, CFA®, has noticed a perplexing phenomenon over the many years he's spent building wealth for his clients. "When people need a life-saving surgery, they search for a highly reviewed physician. But if they are looking for a wealth manager, they often simply hire someone their family or friends recommend," says the renowned Chicago wealth manager and founder of the eponymous wealth management firm, Kovitz.

Anyone looking for a financial planner or wealth advisor, Kovitz says, needs to ask three critical questions. "First, how is the advisor's personal money invested, and will yours be invested the same way? Second, what is their track record? We are proud to share our independently verified returns going back many years—a kind of transparency unique in this industry. Finally, what is the fee structure? Our clients pay one fee for asset management; our financial planning services are available for no extra charge," he explains.

“
We consider ourselves a values-based firm. Strong values and integrity are vital parts of what we do and how we operate. Building great wealth is important. How you get there matters.
”

Proudly Independent

The firm's open approach has served it well. Today, Kovitz manages approximately \$6 billion for about 2,000 high net worth individual and institutional clients nationwide. The Kovitz team is part of the Focus Financial Partners network, the leading international partnership of independent fiduciary

wealth management firms. As a fee-based firm, unbound by interference from a large broker-dealer, Kovitz wealth managers are free to focus on long-term investment solutions backed by their own solid, stringent research. Every decision is made in the client's best interests.

"Discipline, patience, and an 'owner mindset' allow us to filter out the noise of day-to-day markets and seek value through long-term performance," says Kovitz.

Kovitz clients benefit from the dynamic synergy between the firm's asset management and financial planning teams. "In the Chicago area—and across the country—there are plenty of registered investment advisors, but there is a tendency for firms to focus either on investments or financial planning; it's rare to find groups that excel at both sides of the equation," says Ted Rupp, principal and co-president of the firm. "Kovitz offers superb asset management in addition to wealth advisory and financial planning specialists that delve into taxation—many are CPAs—as well as evaluating insurance needs, estate, and legacy planning."

Many people try to manage their own money, but Kovitz believes there's no substitute for having a team of brilliant and experienced finance professionals one phone call away. Collaboration is a crucial part of the Kovitz process, and each client's dedicated team works alongside them to carefully craft the right plan.

"We consider ourselves a values-based firm," says Kovitz. "Strong values and integrity are vital parts of what we do and how we operate. Building great wealth is important. How you get there matters."



KOVITZ

71 South Wacker Drive, Suite 1860
Chicago, IL 60606
312-334-7300
kovitz.com

Kovitz Investment Group Partners, LLC (Kovitz) is an investment adviser registered under the Investment Advisers Act of 1940. Registration of an investment adviser does not imply any level of skill or training. The description of products, services, and performance results of Kovitz contained in this piece are not an offering or a solicitation of any kind. Past performance is not an indication of, and does not guarantee, future results. Securities investments are subject to risk and may lose value. All of the information in this piece is believed to be accurate and correct as of the date set forth. Kovitz does not have or accept responsibility or an obligation to update such information.

The Securities and Exchange Commission maintains a publicly available database that provides information about registered investment advisers and investment adviser representatives. Please visit adviserinfo.sec.gov to obtain more information about Kovitz.