AVAIL

INVEST WITH INTENT

"Planning is bringing the future into the present so that you can do something about it now."

Alan Lakein in "How to Get Control of Your Time and Your Life"

At Avail, we aren't about a cookie-cutter approach to your finances. We're here to be your team and trusted partners, bringing the financial planning experience to help you live the life you dream of. We can help you navigate the milestones, transitions, and curveballs life throws your way, while remaining focused on your mission in life: what you want to do, and who you want to be.

Let us help you navigate...

- a job transition
- growing your family
- changing marital status
- moving to a new home
- buying or selling a business or real estate
- avoiding or recovering from a catastrophic event

As you seek to achieve...

- spending your time and energy in meaningful ways, before and after retirement
- providing for your family's ongoing needs, education, medical care and more
- growing or exiting your business
- having an impact on the world

Meet Your Team

Stuart Feinzig

Senior Relationship Manager

A native and lifelong resident of Boston, Stuart Feinzig has been serving clients for almost four decades and has seen it all.

Ryan Hays, CFP®

Wealth Advisor

Ryan started in finance in 2008, and has particular experience in helping families and business owners navigate turbulence.

Investment & Service Team

Martin Wildy, CFA
Investment Manager

Brett Greenfield
Investment Manager

Geoff Caber, AIF®
Investment Manager

Derek Varner, CFA
Investment Manager

Michael Allison, CFA, CFP®
Strategist & Portfolio Manager

Meredith Henderson
Investment Analyst

Arielle Buitenhuys
Investment Associate

Melanie Allison
Marketing & Client Support Specialist

Our Philosophy & Approach

The foundation of Avail is rooted in our collective belief in the dual importance of holistic planning and shaping portfolios with purpose. We are passionate about making a positive impact, not just in the lives of our clients, but in our communities and the world at large.

Our firm offers two uncommon advantages: a high-touch client experience, and direct access to deeply experienced portfolio managers and financial planners. This means our clients enjoy personalized attention at every step, from regular check-ins and proactive updates to customized solutions that adapt as their lives and goals evolve.

We also believe that our experience as institutional investors allows us to bring a broader investment opportunity set to clients that need more sophisticated solutions. We view investing as ownership, emphasizing responsibility and purpose in every investment decision. Our investment process combines top-down analysis (asset allocation) with bottom-up evaluation (security selection) to create thoughtful, customized solutions aligned with your risk tolerance, financial goals, and values.

Working with Avail

Timeline

Discovery: Our "get to know you" call allows us to begin to understand your goals and values and sketch out how we might support them, and allows you to ask your questions and decide if we're the right team for you.

Strategy Development:
In this stage we are getting a holistic picture of your current financial status, accounts, and goals. We can begin managing an existing investment portfolio as soon as it is transferred. This "getting organized" stage automatically puts you in a better position to achieve your goals.

Sample tasks: Uploading tax returns, account statements, and estate documents such as a will.

Plan Delivery & Implementation:
Putting together a comprehensive financial plan is a significant step. Once your plan is in place, you and your advisor will work together, step by step, to execute each part.

Sample tasks: Review the financial plan and make initial adjustments. Set up automatic savings and investment plans. Apply for life insurance. Establish elements of your tax strategy.

Ongoing Strategy Adjustments:
Once your plan is set up, we automate as many pieces as possible so you can focus on living your life, knowing that your finances are optimized to support reaching your goals over time. We'll meet as needed to review and update goals and plans, and your advisor will also be available for needs and questions as they arise.

Sample tasks: Call your advisor to guide you through things like a job change, home renovation, or growing your family.

Your comprehensive financial plan includes...

- **Funding strategies** for goals like education, travel, or whatever your dreams involve!
- Managing your **investment portfolio** in alignment with your goals and values
- **Cash flow**, budgeting, and debt management, simplified for daily life
- Planning for **retirement**, long-term care and wellbeing
- **Risk management** and insurance planning
- **Business planning** and strategy
- **Tax optimization** strategies
- **Estate** and legacy planning
- **Charitable** giving

...so you can live your life
for what matters most.

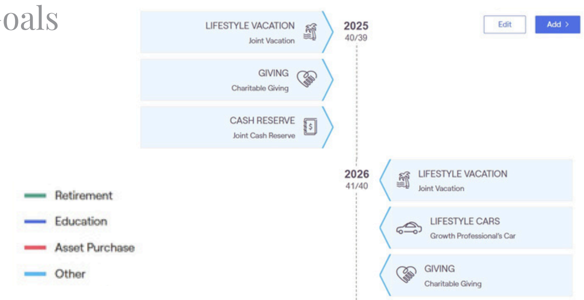
Client Portal: RightCapital

RightCapital, our client portal and mobile app, provides a real-time view of all aspects of your financial plan all in one place. Get clarity with tools for understanding your cash flow, budget and progress, investments, and more.

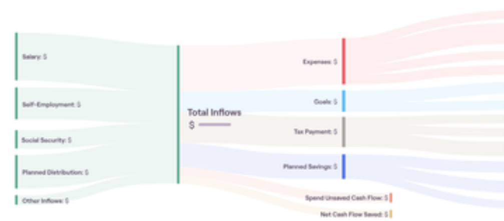
Retirement Analysis

Monthly Budget

Goals



Cash Flow Management



Your Rights & Responsibilities

Security & Privacy

We take your security and privacy seriously. We implement security measures to protect your information, including data encryption, a secure client portal, multi-factor authentication, and a confidentiality commitment that includes never sharing or selling your information.

Fiduciary Duty

Avail Investment Partners is legally and ethically required to act in your best interest at all times, providing unbiased advice tailored solely to your needs. Choosing us as your advisor means choosing a partner who is fully committed to your financial success.

Fees & Billing

Our fee model is based on assets under management (AUM) and/or financial planning services, and can be adjusted based on your needs and services. Your advisor will review this in detail during your Discovery meeting.

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CONTACT
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Book a Discovery Call