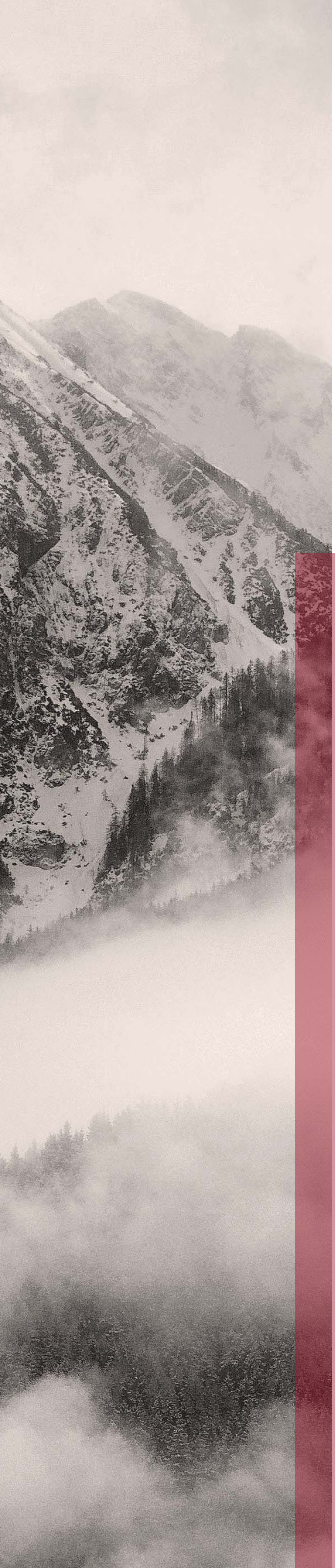
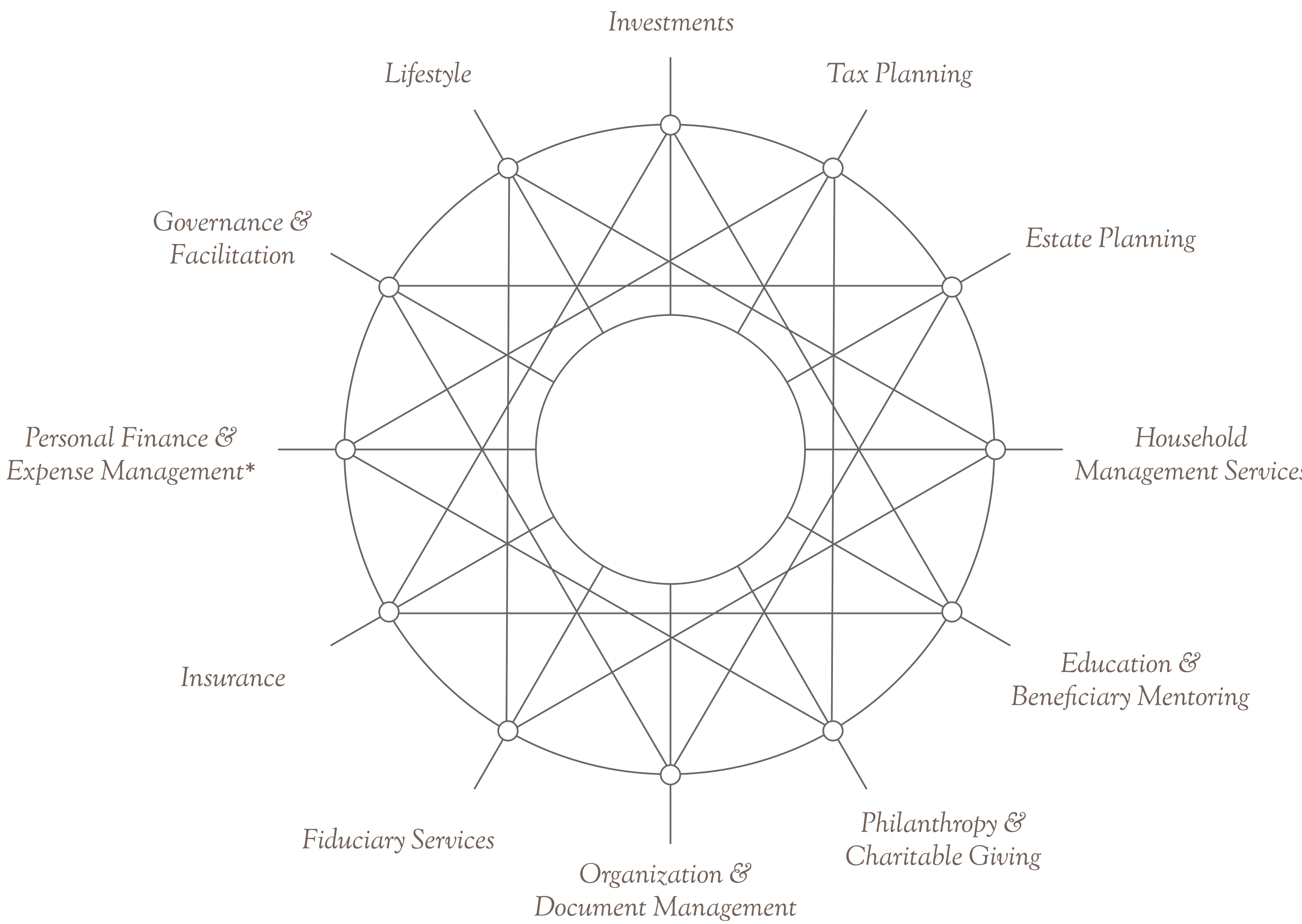
Private Client Services

PRESERVING YOUR LEGACY FOR GENERATIONS TO COME


We are changing
the future of
financial advice.



COMPREHENSIVE SERVICES.



[1]Accounting, auditing, consulting solutions are provided Carr, Riggs & Ingram, LLC.
Level Four Group, LLC and its affiliates is part of the family of companies of Carr, Riggs & Ingram, LLC.

EXPECT MORE.

Level Four provides a boutique multi-faceted experience with a multi-generational outlook. We are backed by the strength of a national enterprise and the experience and knowledge of our ensemble team.

We are committed to simplifying the wealth management experience.

Today's market complexity demands specialized attention and a modern approach to wealth management. Our approach ensures that clients receive truly comprehensive and proactive advice by connecting you to a team of specialists who offer holistic solutions to ensure a lasting legacy.

Level Four goes beyond conventional asset management. Your management team of in-house specialists will advise you on all aspects of wealth; from risk management, strategic planning, investing, to tax and estate planning.

Through our family of companies within Carr, Riggs & Ingram, LLC (CRI), Level Four not only offers a breadth of services, but provides access to a diversified team of industry professionals in order to ensure all facets of your needs can be met.

As a firm, we put your needs first and prioritize your goals in both a neutral and objective fashion which enables us to be your fiduciary. We believe in providing proactive services, as well as reactive, through a centralized 4 step process of Organizing, Creating, Planning, and Communicating. We pride ourselves in being able to leverage your combined forms of capital — Financial, Intellectual, and Human — in order to protect what you've worked hard to achieve.

CRI CARR RIGGS & INGRAM
CPAs and Advisors

CRI CARR RIGGS & INGRAM TPA Services A DIVISION OF CARR, RIGGS & INGRAM CAPITAL, LLC

CRI CARR RIGGS & INGRAM Capital Advisors A DIVISION OF CARR, RIGGS & INGRAM CAPITAL, LLC

CRI CARR RIGGS & INGRAM Solutions Group A DIVISION OF CARR, RIGGS & INGRAM CAPITAL, LLC

CRI CARR RIGGS & INGRAM Advanced Analytics A DIVISION OF CARR, RIGGS & INGRAM CAPITAL, LLC

LEVEL FOUR® Group, LLC A DIVISION OF CARR, RIGGS & INGRAM CAPITAL, LLC

AUDITWERX A DIVISION OF CARR, RIGGS & INGRAM CAPITAL, LLC

PAYWERX A DIVISION OF CARR, RIGGS & INGRAM CAPITAL, LLC

PREFERRED Legacy Trust A DIVISION OF CARR, RIGGS & INGRAM CAPITAL, LLC

YOUR TEAM.

Your ensemble team of advisors work in concert to implement customized strategies aligned with your vision.

Private Client Wealth Advisor

Your Private Client Wealth Advisor serves as your primary contact and will coordinate the activities of your tax, legal, and wealth management advisors.

Investment Advisor

Your Investment Advisor is responsible for coordinating your entire investment picture and designing custom portfolio strategies based on our expertise as it relates to current market trends.

Advanced Planning Advisors

Your Advanced Planning Advisor will guide you through the complexities of tax, estate planning & risk management.

FINANCIAL CAPITAL

Responsible stewardship of current family wealth continues to be one of the strongest indicators of future success for families.

Level Four Private Client Services facilitates the responsible planning and management of financial resources through our team of skilled professionals, each of whom is dedicated to helping you maintain and strengthen your continued success.

Success means different things to different people. Level Four is committed to helping you achieve and maintain *your* definition of success. Whether that means leaving a legacy for your loved ones, scaling your business, or starting a passion project, we are here to assist you every step of the way.

INTELLECTUAL CAPITAL

Intellectual Capital is the competitive edge that has made your family successful. This knowledge is acquired through experiences and passed down from generation to generation through both stories and those shared experiences.

Level Four Private Client Services is both inspired by those shared stories and empowered by our extensive experience of working with successful families and helping them navigate through various financial complexities.

HUMAN CAPITAL

Human Capital is the unique social, personal, and relational qualities held by each individual in your family – the qualities that shape and define your family's success.

This key element also drives Level Four Private Client Services to continually learn, remain innovative, and bring our collective experience to bear for your family.

Our collaborative community, personal relationships, and shared values make the difference and help us deliver successful outcomes.

Your Fiduciary

As your fiduciary, we are held to the highest ethical standard of care and loyalty, always acting in your best interest.

We will:

- Avoid and properly manage conflicts of interest
- Focus on due diligence and prudence that includes well documented processes
- Put the client's needs before the firm's

Your Investments

We focus on absolute, not relative, returns, with risk management as our driving force. Our firm has the expertise to design your personal Investment Policy Statement, help manage your various investment providers, and define investment solutions on your behalf. Your portfolio is designed and managed entirely to your unique needs and specifications – no two families are alike, just as no two portfolios are alike.

Your Legacy

Our experienced team of tax and estate planning professionals provide customized wealth preservation and transfer strategies. We are proactive and stay ahead of current legislation in order to ensure you benefit from forward thinking strategies and implementations. Working with our in-house team affords you greater control, privacy, and security of your legacy.

Your Private Client Experience

Our customized and integrated services provide you with a centralized for all your financial management needs. Your experience is tailored according to your family's unique specifications and requirements.

THE LEVEL FOUR
PRIVATE CLIENT DIFFERENCE.

TRANSPARENCY

We believe in accountability and providing transparency. Our fee structures are clear and designed to align with your best interests. We act as your fiduciary – providing objective advice free from selling products or gathering assets.

EXCLUSIVITY

Our ethos is to treat each family or individual as unique and exclusive. There is no "one size fits all" approach. Our unique approach translates to a customized white-glove experience grounded in confidentiality.

SYNCHRONY

Our firm is uniquely positioned, enabling us to seamlessly integrate various ancillary elements in order to most effectively achieve synergy. We work as a team to ensure that your wealth is always working for you and moving towards your ultimate goal.

ACCESS

As our valued client, you have access to a deep roster of experienced specialists. By leveraging proactive communication in tandem with a client-centic focus we are able to provided 24/7 availability to you and your family.

Inspired by the past.
Defined by the present.
Creating the future.

Our team is fully invested in your continued success.


Connecting your vision
to your legacy through the
generations.

LEVEL FOUR®

Advisory Services

A DIVISION OF
CARR, RIGGS & INGRAM CAPITAL, LLC