

Ready to learn More
about a Partnership?

evestia.com/get-started



Custom Stock SMA Solutions



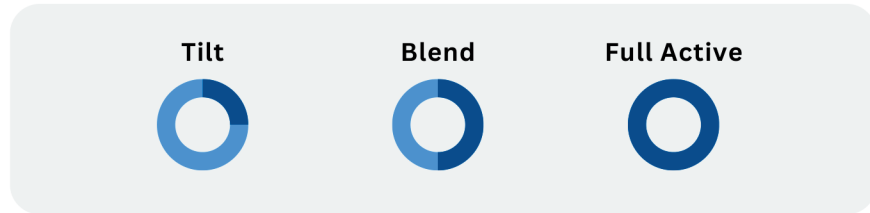
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1 Choose Your Active

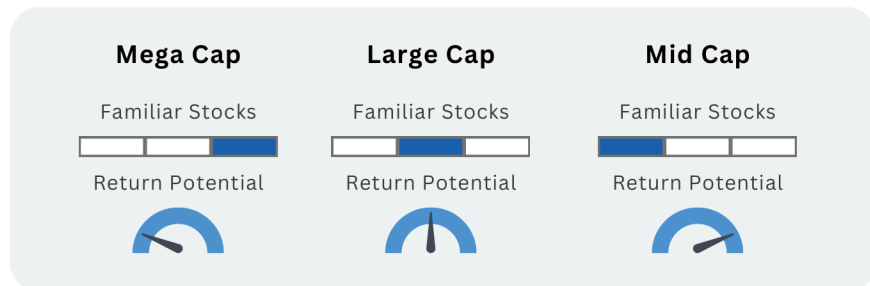
Tilt Blend Full Active



2 Select Size

Mega Cap Large Cap Mid Cap

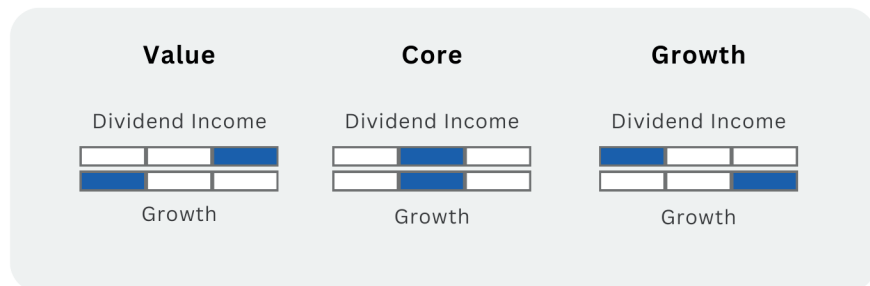
Familiar Stocks Return Potential



3 Pick Your Style

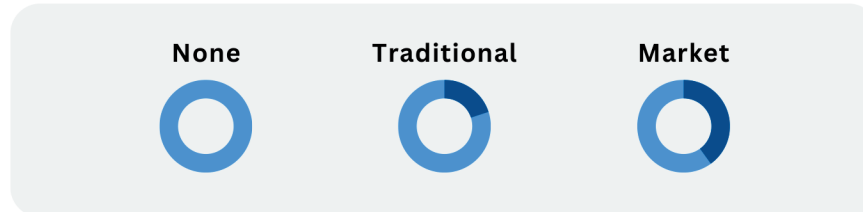
Value Core Growth

Dividend Income Growth



4 Choose Foreign Exposure

None Traditional Market



5 Select Enhancers

Tax Loss Harvesting Commodities Municipal Bonds Real Estate



6 Number of Risk Buckets

3 5 7



Custom Investment Strategies Built Around Your Firm.



Crafted to Your Specifications

Answer a few key questions to help us craft a strategy aligned with your preferred investing style and objectives. Once your goals are clear, we'll create and execute the strategy on your behalf, allowing you more time to focus on meeting with clients.

Built Around Your Firm

All strategies are created with your business in mind, meaning your name, logos, and colors.

Grow Your Practice

Stand out with custom strategies designed to attract High Net Worth clients.