

# TRUADVICE

BACK OFFICE INVESTMENT PARTNER

*TRUADVICE® assists advisors by offering a comprehensive service platform to support all key aspects of their business.*



## OPERATIONS

TRUADVICE® aids the advisor in the day-to-day operational support so they can focus on serving you and your family.



## COMPLIANCE

TRUADVICE® offers expert guidance and advice to your advisor through our strategic alliances in managing the legal details of your investments.



## EDUCATION & TRAINING

CEO and founder, Chris Sleight focuses on one-on-one mentorship with advisors to ensure they are always up to date on industry changes and new opportunities.



## TRU ANALYTICS

We act as an extension of your advisors office to help analyze and construct comprehensive financial plans. We view financial planning as an ongoing, ever changing process and tailor each financial plan based on your changing "wants and needs" as you go through life.



### EDUCATION AND TRAINING

**Chris Sleight**  
Founder

### FINANCIAL PLANNING



**Nick Gyeszat,**  
CFP®, CIMA®  
Managing Director



**David Berns**  
Financial Planning  
Coordinator



**Bonnie Anderson**  
Director, Operations



**Ross Taylor**  
Head Trader, Senior  
Database Administrator



**Samantha Logsdon**  
Relationship Manager

### OPERATIONS AND TRADING

## LEADERSHIP PRINCIPLES

ADVOCATE FOR ADVISORS

EMBRACE AND DRIVE CHANGE

STRIVE TO INSPIRE

WE DO WHAT'S RIGHT,  
NOT WHAT'S EASY

BE HUMBLE & GRATEFUL

### IMPORTANT INFORMATION

TRUADVICE, LLC, is an investment advisor registered with the United States Securities and Exchange Commission. Registration does not imply any level of skill or training. TRUADVICE, LLC's unique CRD number is 292482. You can obtain a copy of TRUADVICE, LLC's firm brochure (Form ADV Part 2A) and client relationship summary (Form CRS) free of charge by visiting <https://adviserinfo.sec.gov/firm/summary/292482>. TRUADVICE, LLC offers investment advisory services only where it is appropriately registered or exempt from registration and only after clients have entered into an investment advisory agreement confirming the terms of engagement, and have been provided a copy of the firm's ADV Part 2A & CRS. This material has been prepared for informational purposes only and should not be construed as a solicitation to effect, or attempt to effect, either transactions in securities or the rendering of personalized investment advice. This material is not intended to provide, and should not be relied on for tax, legal, accounting, or other financial advice. TRUADVICE, LLC does not provide tax, legal or accounting advice. You should consult your own tax, legal, and accounting advisors before engaging in any transaction.