

THE CORE DIFFERENCE



AlphaCore is a wealth advisory firm dedicated to serving our clients with comprehensive wealth management plans utilizing traditional and alternative investments.

At AlphaCore we believe in aligning our interests with our clients. Our executive team entrusts their personal assets with AlphaCore, ensuring that our clients and their families will always receive unrivaled service, performance reporting tools, and investment management.

OUR SERVICES

We create comprehensive wealth management plans for our clients to help them achieve financial peace of mind in any market environment.



Understand Current Financial Situation

We start by meeting you and your family to gain a thorough understanding of your current investment situation and ultimate lifetime and legacy goals.



Determine Goals and Objectives

We conduct a personal financial review to help you determine the best path toward achieving your goals.



Create Total Wealth Management Plan

After our initial assessment, we utilize the most advanced financial planning tools available to create a customized wealth management plan.



Implement Your Customized Plan

We make all of our investment decisions with your best interests in mind, and together, we agree on a personalized investment strategy.



Ongoing Management

Our job isn't over once your plan is implemented. Our team continually monitors your portfolio and makes adjustments as your financial situation evolves and/or economic conditions warrant a change.

ALPHACORE: THE CORE DIFFERENCE

WHY ALPHACORE?

INVESTMENT EXPERTS

We have decades of experience allocating to traditional and alternative investments.

RESEARCH ORIENTED

Our wealth advisors are dedicated to providing you with access to institutional-quality research and due diligence.

CUSTOMIZED SERVICE

Our plans, services, and allocation advice are fully customized to your specific objectives and goals.

SERVING OUR CLIENTS

We strive to be the stewards of our clients' capital by empowering them with access to institutional investment expertise and cutting-edge tools to navigate the ever-changing investment landscape. AlphaCore offers:

- Goal-based financial planning and consulting
- Portfolio analysis, construction, and monitoring
- Collaboration with your other trusted advisors
- Dedicated service and operational team
- Quarterly commentaries and reviews
- On-site research team
- Thought leadership & whitepapers
- Access to exclusive educational events and webinars

ALPHACORE PROPRIETARY ANALYSIS AND CLIENT REPORTING TOOLS



Detailed
Financial
Planning



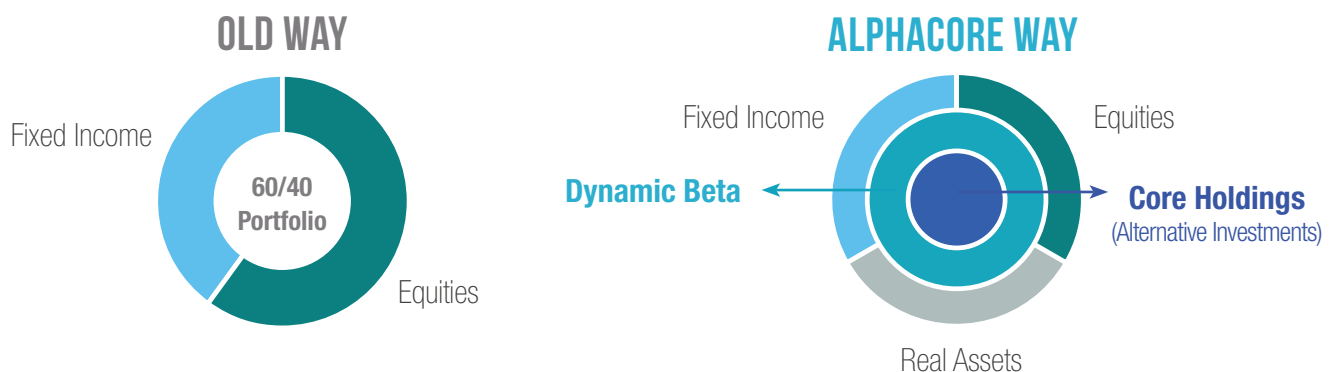
Customized
Performance
Reporting



Valuable Risk
Management
Analysis

RETHINKING ASSET ALLOCATION

We believe a well thought out financial plan should include alternative investments to potentially lower portfolio risk and help clients reach their financial goals.



Charts are for illustrative purposes only, and do not represent a specific portfolio or strategy managed by AlphaCore. There is no guarantee that any investment strategy will achieve its objectives, generate profits, or avoid losses.



**Get in touch with one of our
wealth advisors to begin
your journey today.**



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875 Prospect Street, Suite 315
La Jolla, CA 92037
858.875.4100
info@alphacorecap.com

WWW.ALPHACOREWEALTH.COM