NOESIS CAPITAL MANAGEMENT

A REGISTERED INVESTMENT ADVISOR

Overview of Services

- **Financial, Retirement and Cash Flow Planning**

- **Investment Management**
  - Individually managed accounts
  - In-house research analysts
  - Asset allocation and risk diversification
  - Equity and fixed income portfolios
  - Individual securities and ETFs

- **Tax Efficient Management Style**
  - Consideration of client's total tax situation
  - Gain/Loss reconciliations for tax filings

- **Consolidate Professional Relationships**
  - Work closely with client's other professionals such as CPAs and Estate Planning Attorney

- **Assist Client with other Financial and Personal Administration**
  - Oversee other non-managed assets such as Retirement Plans
  - Philanthropy and charitable giving
  - Administrative Trustee Services through Schwab Bank
  - Personal Trust Reporting Services through Schwab Institutional