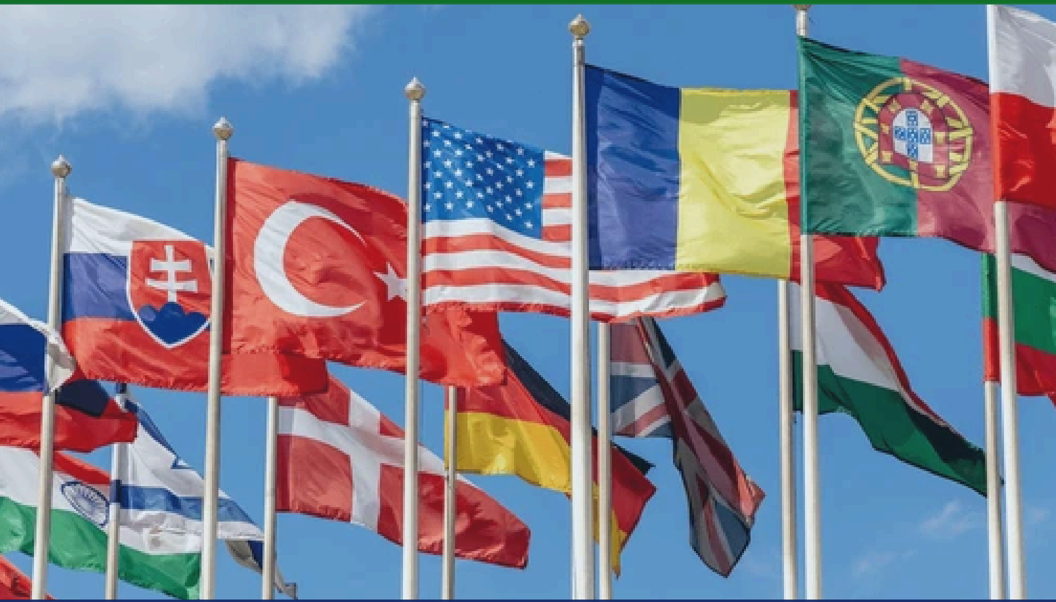
GLOBAL
ADVISOR GROUP

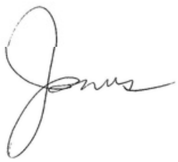
Dedicated to Serving the Financial Planning Needs of the International School Community.



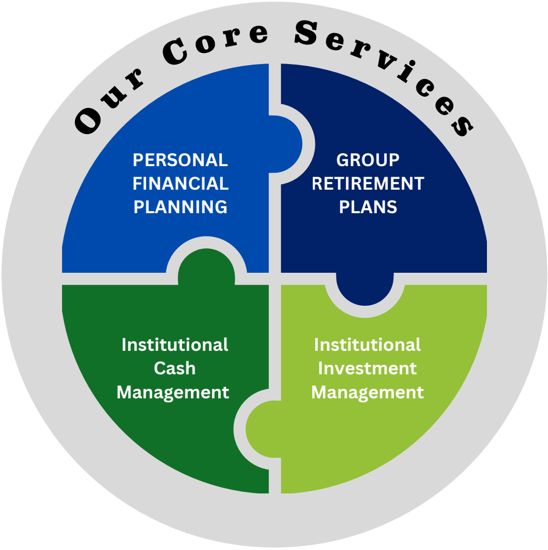
1939 Roland Clarke Place, Suite 400, Reston, VA 20191
Toll Free: 800-356-5585 ·Phone: 703-406-8440 · Fax: 703-406-8441
www.GlobalAdvisorGroup.com

Founded by industry veteran and CEO, James T. Barnette, Jr., CFP®, Global Advisor Group provides financial planning and wealth management services to individuals and institutions in all 50 states and over 50 countries around the world.

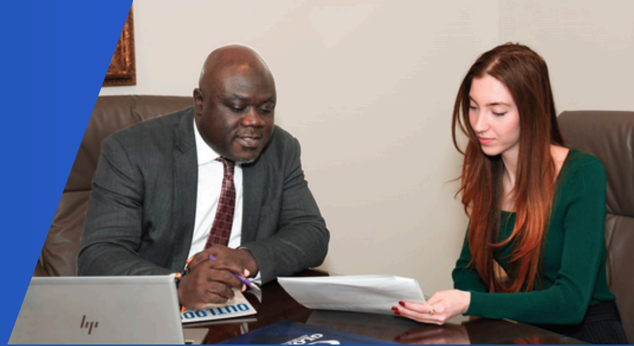
*"As a **CERTIFIED FINANCIAL PLANNER™** professional, I have the **fiduciary responsibility** to uphold the highest standard of client service for financial advice and planning. Our financial advisors utilize their industry experience to assist expatriate Americans, foreign nationals, and international school institutions with their financial planning needs, offering guidance grounded in integrity, objectivity, and professional insight."*



James T. Barnette, Jr., CFP®
CEO, Global Advisor Group



PERSONAL FINANCIAL PLANNING



One-on-one support, for every stage of your financial journey.

Investment Management

We help employees navigate the complex investment landscape with confidence. We offer a wide array of strategies tailored to your investment objectives, risk tolerance, and long-term financial goals.

Tax Planning

We specialize in assisting expatriate Americans to fully leverage the tax advantages available to them while living abroad. We dedicate significant time to ensure they are maximizing their tax benefits.

Retirement Planning

We help hundreds of clients in preparing for retirement. Our process begins with a comprehensive review of your financial picture and retirement aspirations.

Asset Consolidation

Managing financial assets while working in various locations can be challenging. We can help consolidate accounts into a single location, offering an organized and holistic approach to financial management.

GROUP RETIREMENT PLANS

Why Offer a Group Retirement Plan?

Offering a retirement benefit is a key component for international schools to attract and retain top-tier educators. An employer-sponsored retirement plan allows schools to contribute directly to employees' accounts, significantly boosting their overall retirement savings.

Partner with Global Advisor Group

When you partner with Global Advisor Group, your employees gain access to valuable educational resources and support to confidently navigate their retirement journey.

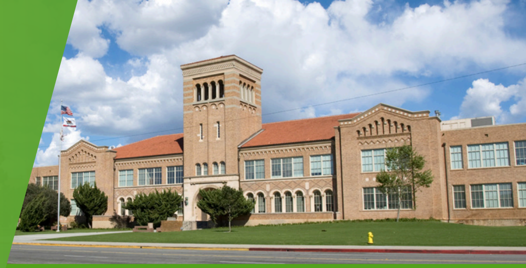
Experience You Can Value

For over **20 years** we've been working with international schools to establish and administer retirement plans. We service IRS qualified Roth 401(k) plans and non-qualified Matched Savings Plans, providing flexible strategies to meet diverse needs.

Tailored Strategies for Your School

We work closely with each school's administration to understand their unique objectives. By considering local regulations, we design retirement plans that align with the specific needs of each organization.

INSTITUTIONAL INVESTMENT MANAGEMENT



Tailored Strategies for Institutions

Our process begins with understanding your organization's mandates, finances, and goals for building an institutional investment portfolio.

We establish an Investment Policy Statement (IPS) and sound governance to ensure that investment decisions align with the institution's goals.

A Collaborative & Flexible Approach

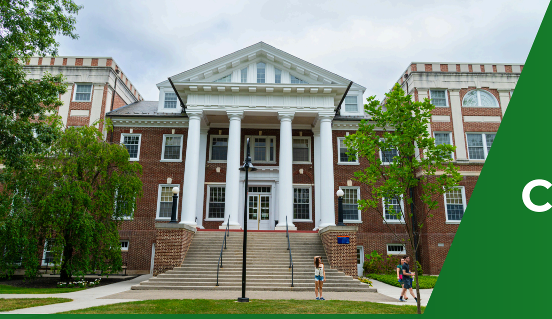
Our collaborative process ensures ongoing evaluation and adjustments, maintaining flexibility within acceptable risk as markets evolve.

Our Expertise is Applied Across Three Levels

1 Risk ranges and rebalancing guidelines are established around target allocations to various asset classes used in the portfolio.

2 Due diligence and selection of portfolio managers are practiced to offer a reasonable probability of helping achieve the stated objectives.

3 The progress of the portfolio is monitored on an ongoing basis, including reporting, review meetings, and recommending adjustments when circumstances warrant.



INSTITUTIONAL CASH MANAGEMENT

Seeking to Maximize Returns on Cash Balances

We specialize in helping organizations seeking to earn higher returns on their cash reserves through tailored cash management strategies.

A Guided Approach to Cash Management

Our strategies go beyond traditional bank rates, offering more conducive options for potentially higher-yielding investments.

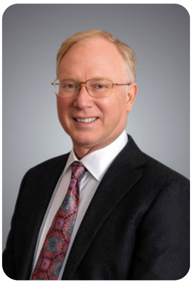
Flexible Strategies for Your Needs

Whether managing an operating budget or reserve funds, we leverage opportunities such as money markets and alternative cash investments to potentially enhance cash yields.

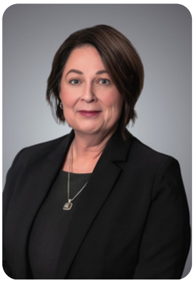
**Optimize Cash Reserves
with Balanced, Strategic Growth.**

There can be no assurance that any investment process or strategy will achieve its objective. As with any investment vehicle there is always the potential for gains as well as the possibility of losses.

OUR SERVICE TEAM



James T. Barnette, Jr. CFP®
Chief Executive Officer

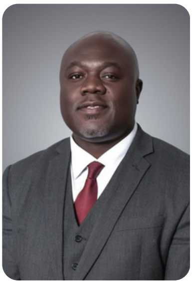


Joan Confoy CFP®, CPFA®, AIF®
Director of Group Retirement Plan Services

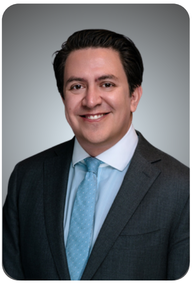
Nathan Barnette CFP® CPFA®
Retirement Plan Consultant

Julia Simmons
EARCOS | NESA

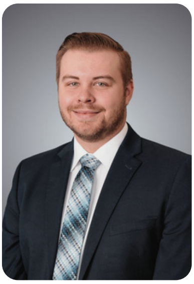
Lone Bjork
Europe



Nathan Addo CFP®
AISA



Rodrigo de la Roca CFP®
Tri-Association | AMISA



Daniel Malloy
Institutions & Endowments

Investors should consider the investment objectives, risks, charges and expenses of the funds. This and other important information about the investment company are contained in the prospectus, which can be obtained from your financial advisor and should be read carefully before investing.

Investment Advice offered through Private Advisor Group, LLC, a Registered Investment Advisor. Global Advisor Group, Interactive Brokers and Private Advisor Group, LLC are separate entities.

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Contact Us...

Because Our Clients Are Our World.

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M-F 8:30 AM - 5:30 PM ET

QR Code for our website