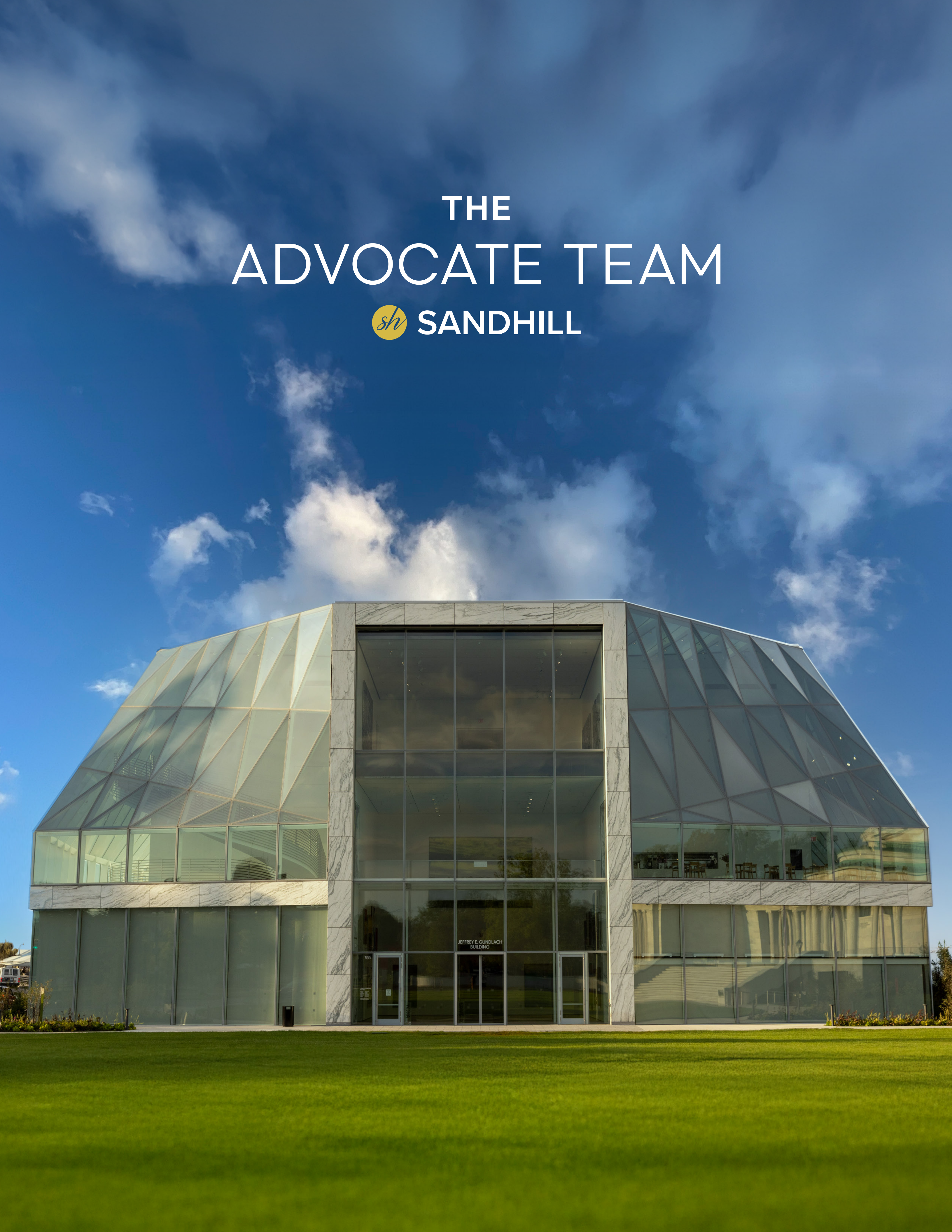
THE

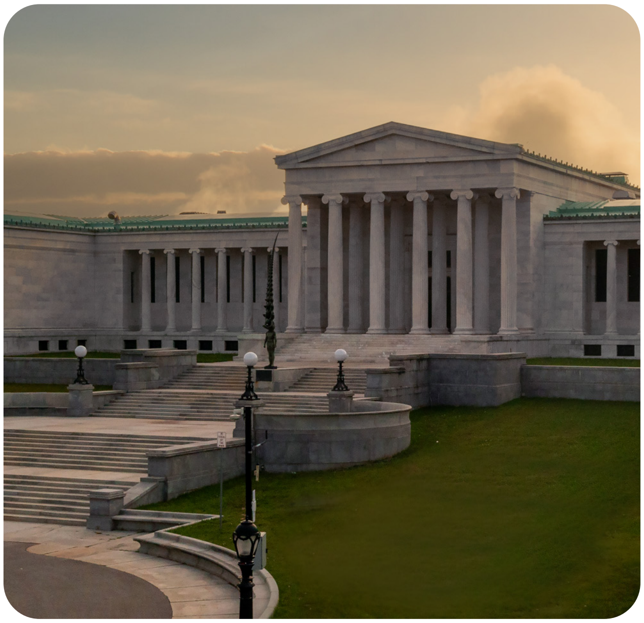
ADVOCATE TEAM

SANDHILL



THE SANDHILL DIFFERENCE

Our Purpose & Promise



The Advocate Team at Sandhill, founded in 2018, is dedicated to delivering customized, best-in-class financial advice and investment management to high-net-worth and entrepreneurial families.

Our mission is to help families maximize growth, protect capital, minimize taxes, and transfer wealth –ensuring a lasting legacy for generations through detailed planning and customized strategies.

We go beyond surface-level solutions to organize your entire financial picture, ensuring your objectives are met, investments are prudently managed, and heirs are responsibly prepared. With a deep commitment to fostering family unity, we establish strategies that strengthen bonds and shared values, ensuring your legacy endures with harmony.

Wherever you are in your financial journey, The Advocate Team at Sandhill is your partner in building and sustaining a lasting, generational legacy.

Our Four Pillars for Building & Sustaining Legacy

Maximize Growth

Design tailored investment strategies to optimize wealth accumulation.

Minimize Taxes

Integrate tax-efficient strategies to preserve more of your wealth.

Protect Capital

Safeguard your assets with prudent management and risk mitigation.

Transfer Wealth

Prepare heirs and structure plans for seamless multigenerational wealth transitions that are purposed to keep families unified.

HOW WE CAN HELP

A Comprehensive Suite of Services

Proprietary Investment Management	We create custom stock, bond, cash, and alternative investment strategies that fit your needs, all monitored by our in-house team of five exceptional analysts.
Visionary Financial Planning	We build detailed financial plans to assure your future cash needs are thoughtfully considered using best-in-class software to make it simple and tailored to you.
Nurturing Family & Legacy	Our team will get to know your heirs and do our part to make sure that they carry forward your values, while working to strengthen family relationships and assuring financial preparedness.
Philanthropy with Purpose	We align your charitable endeavors with your values, creating a giving strategy that reflects your family's vision and leaves a lasting impact.
Thoughtful Business Succession	Whether for a family enterprise or a public company, we facilitate transitions with clarity, precision, and transparency.
Integrated Estate & Tax Planning	In partnership with your advisors, we craft strategies that safeguard your wealth and promote enduring family cohesion.
Optimized Income Planning	We design cash flow solutions that empower your lifestyle while aligning with your long-term vision.
Discerning Alternative Investments	From private ventures to digital assets, we provide insightful guidance to navigate unique opportunities with assurance.

Why Entrust Your Legacy to The Advocate Team?

At The Advocate Team, we are passionate about understanding your family identity.

This is a reflection of your life's work, your values, and your vision for future generations. We are dedicated to understanding you deeply and creating personalized solutions that honor your unique story.

A Tailored Approach, Crafted with Care

We begin by listening to the intricacies of your circumstances, your family's dynamics, and the aspirations that define your vision.

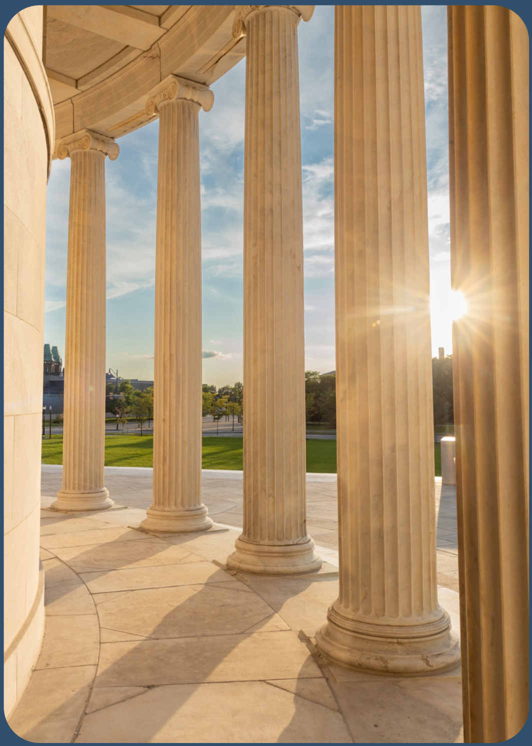
With great attention to detail, we model your financial future, weaving in tax considerations and estate planning to ensure seamless alignment.

Collaborating closely with your trusted tax, legal, and estate advisors (or introducing you to our trusted partners), we design multigenerational wealth strategies that are as unique as you are. Our plans foster harmony, ensuring transparent and thoughtful transitions that strengthen family bonds for years to come.

Our Legacy of Expertise & Devotion

With decades of combined experience guiding families through complex wealth transitions and business successions, we bring passion and particular expertise to every relationship. Our purpose lies in protecting and growing your wealth with meticulous care and service.

We are committed to building a legacy that not only endures but also draws generations closer together, creating a timeless bond rooted in your distinct values.



Your Advocate Team

Jonathan Amoia, CPWA®, CEPA®, CBDA™

PARTNER, MANAGING DIRECTOR
CERTIFIED PRIVATE WEALTH ADVISOR®
CERTIFIED EXIT PLANNING ADVISOR®
CERTIFIED IN BLOCKCHAIN & DIGITAL ASSETS™

AREAS OF EXPERTISE

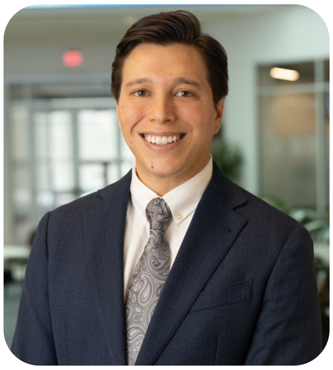
Business succession and exit planning, investment management strategies, multi-generational estate planning, educating children and heirs, digital assets and alternative investments

EDUCATION

MBA, University of Rochester; B.S., SUNY New Paltz; Certified Private Wealth Advisor®, Yale School of Management; Certified Exit Planning Advisor®, Exit Planning Institute

CIVIC INVOLVEMENT

Board Member, Buffalo AKG Art Museum; Board Member, BISON Children's Scholarship Fund; Founder/Board Member, The So Loved



Christian Martinez, CFP®

INVESTMENT ADVISOR
CERTIFIED FINANCIAL PLANNER®

AREAS OF EXPERTISE

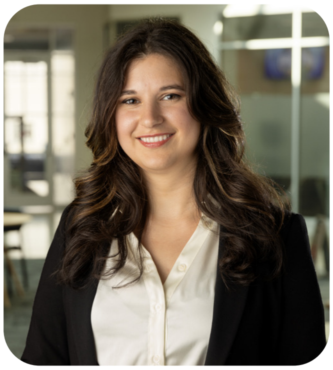
Comprehensive and holistic financial/retirement planning, cash flow management, tax minimization strategies, real estate investment strategies

EDUCATION

B.S., Buffalo State College; CFP®, Certified Financial Planner Board of Standards

CIVIC INVOLVEMENT

President, Canisius High School Alumni Board of Governors; Co-Chair, BISON Children's Scholarship Fund President's Council; Board Member, Buffalo Rotary Foundation



Julianna Zin

CLIENT SERVICE ASSOCIATE

Julianna is proactively involved in managing all client interactions and plays a critical role in assisting Jonathan with day-to-day account management responsibilities.

Megan LaRue

CLIENT SERVICE ASSOCIATE

Megan works in tandem with Christian to deliver white-glove service and high-touch support to our valued clients.

MEET WITH US

Walking Alongside You for Generations

We look forward to connecting with you and your family to begin this journey together.

Sandhill Investment Management

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