The Advocate Team

Your Peace.
Our Purpose.

SANDHILL
INVESTMENT MANAGEMENT

sandhill-im.com

The Advocate Team

Maximize Growth

Minimize Taxes

Protect Assets

Transfer Wealth

Recognizing the many challenges that face your family's long-term financial future, we look to these four pillars to help you continue to build and maintain a lasting legacy.

Discerning financial advice meets customized investment management

Producing wealth takes years of dedication, focus, and sacrifice. You endured challenging times and deeply understand the importance of protecting what you have built, while valuing thoughtful financial advice for your family's future.

Founded in 2018, The Advocate Team was established with a specific purpose in mind: to provide completely customized, best-in-class advice and investment management to high-net-worth and entrepreneurial families. While our team at Sandhill offers proprietary stock, bond, and cash management solutions along with sourcing alternative external investments, we go beyond the surface to organize your multigenerational financial picture. Within this process, we engage new or existing tax, legal, and estate partners to ensure every detail is integrated within your plan. **Our goal is simple: to make certain that your financial objectives are achieved, your investments are prudently managed, and your heirs are educationally prepared.**

Not only are we passionate about helping families grow and transition their wealth, but we possess the experience, skill, and commitment necessary to ensure your legacy is sustained for generations to come. Our team has walked alongside client business successions for both public and private companies while assisting with the transition of many family businesses. Wherever you are in your financial journey, we will provide the resources to ensure that your family is cared for.

Defining Your Financial Future

Your circumstances, family dynamics, and financial considerations are uniquely yours. When designing your comprehensive, multigenerational financial plan, customization is everything. Our team takes the time to understand every asset, liability, and person that is important to your future. We model annual cash flows to account for tax implications and estate planning strategies while determining an optimal investment lineup.

Leveraging support from sophisticated planning software and your external tax and legal team, we can proactively manage all facets of your financial life — providing you and your family with safety, security, and peace of mind. Our team understands the importance of getting to know your heirs, identifying their strengths, and ensuring that they have the resources and support to carry on your family legacy.

- Multidisciplinary Investment Management
- Retirement Savings and Income Planning
- Family Dynamics and Heir Coaching
- Charitable and Philanthropic Advising
- Business and Succession Planning
- Estate and Tax Strategies
- Individualized Income Planning
- Alternative and Private Investment Guidance

Our Team

Jonathan Amoia
Partner, Managing Director
Certified Private Wealth Advisor®
Certified Exit Planning Advisor®

Areas of Expertise: Business succession and exit planning, investment management strategies, multi-generational estate planning, educating children and heirs

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

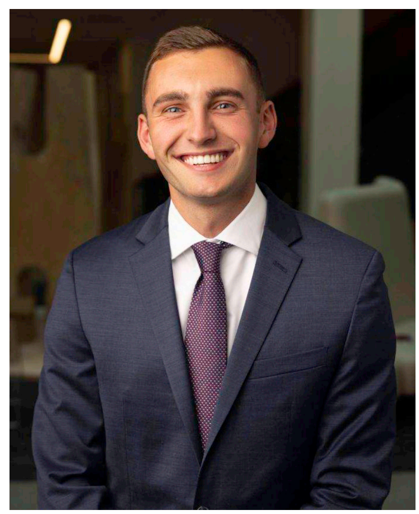
Civic Involvement: Board Member at Buffalo AKG Art Museum; BISON Children's Scholarship Fund; Fellowship of Christian Athletes

Christian Martinez
Advisor Associate
CERTIFIED FINANCIAL PLANNER™

Areas of Expertise: Comprehensive financial and retirement planning, cash flow management, tax minimization strategies

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

Civic Involvement: Buffalo AKG Art Museum Convergence Council, BISON Children's Scholarship Fund President's Council, Canisius High School Alumni Board of Governors



Patrick Collins
Advisor Associate

Areas of Expertise: Account management and oversight, client onboarding and execution, relationship management and cultivation

Education: B.S., Canisius College

Civic Involvement: Canisius High School Alumni Board of Governors, NativityMiguel School Junior Board, WNY Prosperity Professionals Board of Directors