Helping clients build, preserve, transfer, and donate wealth.

WEALTH MANAGEMENT
FOR FAMILIES AND BUSINESS OWNERS

CLIENT-FOCUSED

Every recommendation we make is based solely on how it serves the best interest of our clients. At KAM, "putting our clients first" is not a catchy tagline. It's how we operate.

KNOWLEDGEABLE

We take a unique approach that prioritizes evidence over emotion. It's based on decades of academic research rather than the opinions that dominate the financial news cycles.

PASSIONATE

We're commited to looking out for the best interest of our clients. We value our personal relationships with clients and enjoy watching them achieve their goals.

Kraft Asset Management LLC

615-242-7351
kraftasset.com

555 Great Circle Road · Nashville, Tennessee · 37228

WHAT WE DO

Kraft Asset Management, LLC (KAM) is a registered investment advisory firm that has helped clients and their families build, preserve, transfer, and donate wealth for years. A wholly owned affiliate of Nashville-based KraftCPAs, KAM was formed to meet client demand for unbiased, fee-based investment advice. Our advisors establish close and trustworthy relationships with our clients to understand their most important values, goals, and relationships. That deep knowledge forms the foundation for each client's individualized plan. Our key focus areas include:

WEALTH MANAGEMENT

Having a well-defined wealth management strategy is important now and in the future. Proper planning includes establishing your goals, developing defined strategies to achieve those goals, implementing these strategies, and monitoring your progress in attaining those goals. Our all-encompassing approach includes:

- Investment Management
- Estate Planning
- Retirement Planning
- Income Tax Planning
- Risk Management
- Cash Flow Management
- Insurance Planning
- Education Planning

PLANNING FOR BUSINESS OWNERS

Retirement
Your retirement plan is an important employee benefit. We can help you make your plan the best it can be.

Risk Management
We can help insulate your family, assets, and income from potential loss through our risk management services.

Exit Planning
For more than six decades, the Kraft family has assisted businesses get through the challenges that often accompany transition.

MULTI-FAMILY OFFICE SUPPORT

The wealthiest families often have their own staff to handle accounting, tax, wealth management, and governance functions for the family. However, the cost and expertise needed creates a challenge for many families. Now you have another option, and it's a name that's been known and trusted for more than 60 years — Kraft.

BUILD WEALTH

We offer a prudent approach based on our fiduciary relationship with you. We help clients determine and implement investment strategies based on individual risk tolerance, financial objectives, investment time horizon, and need for income. Tax-efficient, structured portfolio funds enable clients to maintain broad diversity, low-cost, and appropriate levels of risk.

PRESERVE WEALTH

Many of your financial goals can span a lifetime — or even generations — so it's important to prepare for uncertain events that could otherwise derail your overall strategy. Once we've defined your long-term objectives, our role also includes identifying potential threats to your success and implementing protection against them.

HOW WE'RE DIFFERENT

Every recommendation we make — and the only advice we give — is based solely on how it serves our clients' best interests. As a registered investment advisory firm, we also have a responsibility to act in your best interest, and we take that responsibility seriously.

Our unique approach — what we call the "science of investing" — is one that prioritizes evidence over emotion. It's based on decades of academic research (The Modern Portfolio Theory) rather than the empty and often wildly fluctuating opinions that dominate the financial news cycle. Years of peer-reviewed research demonstrate this approach to be the most effective way to build long-term wealth. By investing in low-cost, broadly diversified funds and financial instruments, and taking only the risk necessary and appropriate, our clients can achieve their personal financial goals.

We take a holistic approach to wealth management, and managing investments represents only part of the picture. With our wide-ranging expertise in a variety of financial areas, we can serve as the "quarterback" for your broader network of advisors.

As advisors, our purpose is to give our clients:

» **Confidence** from working with an experienced wealth advisor who values evidence over emotion and research over blind opinion.

» **Assurance** from seeing that every facet of their financial lives plays a role in determining their best way forward.

» **Peace of mind** from knowing they have a personalized plan that renders the financial markets' ups-and-downs irrelevant to their future prosperity.

TOP RATED RANKINGS & REVIEWS
BEST FINANCIAL ADVISORS IN NASHVILLE & MEMPHIS, TENNESSEE
ADVISORYHQ
HIGHEST RATING
WWW.ADVISORYHQ.COM

What sets us apart ultimately brings us together: a passion for evidence, devotion to transparency, and the promise to put our clients' interests first in everything we do.

TRANSFER WEALTH

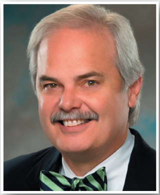
Many identify leaving a legacy among their most important goals, but research indicates that only about one-third of wealth transfers succeed after transition. We have the resources to assist with financial management and estate planning, but we also offer guidance on critical personal dynamics for successful multi-generational wealth transition.

DONATE WEALTH

The true value of philanthropy lies in the meaning it brings to both those giving and those receiving. Legislative changes may afford existing and new opportunities for charitable giving to play an increasing role within your tax planning efforts. If your goals include a philanthropic component, we carefully integrate it within your overall strategy.

OUR TEAM

Kraft Asset Management, LLC is an investment advisory firm in Nashville, Tennessee, that helps high net-worth individuals and their families build, preserve, and transfer wealth. We help clients make smart decisions about financial matters so they can explore their passions and experience peace of mind.



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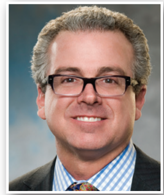

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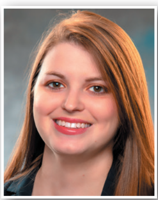

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KraftCPAs PLLC One of the largest independently owned firms in Tennessee, KraftCPAs features a large and experienced tax consulting team that works closely with KAM to provide comprehensive personal financial planning services. *kraftcpas.com*

KraftCPAs PLLC

Dimensional Fund Advisors Dimensional Fund Advisors' (DFA) tax-efficient, structured portfolio funds are available to carefully screened registered investment advisors, including KAM. With more than $500 billion in assets, DFA's structured investment management approach is grounded in academic research and the efficiency of capital markets. *dfaus.com*

Dimensional

Buckingham Strategic Partners Buckingham Strategic Partners is committed to creating a better wealth experience for financial advisors and their clients. The firm's comprehensive wealth platform supports a nationwide community of financial advisors with the resources they need to deliver holistic wealth management solutions and to become better connected, more successful organizations. *buckinghamstrategicpartners.com*

INDEPENDENT MEMBER OF THE
Buckingham
STRATEGIC PARTNERS COMMUNITY

Persons pictured in this brochure are not actual KAM clients.

Past performance is not a guarantee of future results. Investments involve risk, including the risk of loss of principal.

The Best Financial Advisors in Nashville, Franklin, and Memphis, Tennessee in 2021-2022 ranking is published by AdvisoryHQ, an independent company unaffiliated with Kraft Asset Management, LLC ("Kraft"). The ranking is generated using an in-depth methodology AdvisoryHQ refers to as "Top-Down Selection." Firms do not choose to participate in the ranking, as all information is gathered independently by AdvisoryHQ. Kraft did not pay to be included in this ranking. Working with a ranked advisor should be evaluated properly and does not correlate with investment results. Working with a highly-ranked advisor does not ensure that a client or prospective client will experience a higher level of performance or results. Third-party rankings are no guarantee of future investment success or performance. This ranking is conducted by a third-party provider and is not meant to serve as an endorsement for Kraft. Rankings should not be considered an endorsement of the wealth manager by any client nor are they representative of any one client's evaluation. Provided for informational purposes only. Please see https://www.advisoryhq.com/articles/advisoryhqs-methodology-for-selecting-top-advisors/ for more information on the ranking methodology.