



About Rebalance IRA

Rebalance IRA is one of America's leading investment firms that is at the forefront of providing consumers with a fundamentally different and better set of retirement investment options: lower costs, "endowment-quality" globally-diversified retirement investment portfolios, and systematic rebalancing. This investment approach is combined with a team of sophisticated and highly credentialed finance professionals who provide advice that is unbiased and focuses on the client's long-term retirement investment goals.

The Firm's Investment Committee is anchored by three of the most respected experts in the finance world: Princeton Economics Professor Burton Malkiel, author of the classic investment book, *A Random Walk Down Wall Street*; Dr. Charles Ellis, the former longtime chairman of the Yale University Endowment; and Jay Vivian, the former Managing Director of IBM's \$100+ billion retirement investment funds for more than 300,000 employees worldwide.

Rebalance IRA's innovative, pro-consumer approach to retirement investing has garnered high profile coverage. The Firm, and its leadership, regularly have been featured in *The New York Times*, *The Wall Street Journal*, NPR, Fox, PBS, *Forbes*, *USA Today*, CNBC, *Nightly Business Review*, CBS, *The Washington Post*, *The Economist*, and a wide range of other national and local media. Managing Directors Scott Puritz and Mitchell Tuchman are acknowledged industry thought leaders, and Mr. Puritz recently testified before a U.S. Senate Committee evaluating the U.S. Department of Labor's new fiduciary rule.

Rebalance IRA is headquartered in Palo Alto, CA and Bethesda, MD and currently manages over \$600 million of client assets. For more information, visit www.rebalance-ira.com.