

## THE KOVITZ CONSTRUCT

Wealth management firm **Kovitz** offers superb asset management, wealth advisory, and financial planning— with an emphasis on transparency.



**Mitchell Kovitz, CPA, CFA®**  
Principal, Founder, Co-CIO



**Ted Rupp**  
Principal, Co-President

**M**itchell Kovitz, CPA, CFA®, has noticed a perplexing phenomenon over the many years he's spent building wealth for his clients. "When people need a life-saving surgery, they search for a highly reviewed physician. But if they are looking for a wealth manager, they often simply hire someone their family or friends recommend," says the renowned Chicago wealth manager and founder of the eponymous wealth management firm, Kovitz.

Anyone looking for a financial planner or wealth advisor, Kovitz says, needs to ask three critical questions. "First, how is the advisor's personal money invested, and will yours be invested the same way? Second, what is their track record? We are proud to share our independently verified returns going back many years—a kind of transparency unique in this industry. Finally, what is the fee structure? Our clients pay one fee for asset management; our financial planning services are available for no extra charge," he explains.

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**We consider ourselves a values-based firm. Strong values and integrity are vital parts of what we do and how we operate. Building great wealth is important. How you get there matters.**  
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### **Proudly Independent**

The firm's open approach has served it well. Today, Kovitz manages approximately \$6 billion for about 2,000 high net worth individual and institutional clients nationwide. The Kovitz team is part of the Focus Financial Partners network, the leading international partnership of independent fiduciary

wealth management firms. As a fee-based firm, unbound by interference from a large broker-dealer, Kovitz wealth managers are free to focus on long-term investment solutions backed by their own solid, stringent research. Every decision is made in the client's best interests.

"Discipline, patience, and an 'owner mindset' allow us to filter out the noise of day-to-day markets and seek value through long-term performance," says Kovitz.

Kovitz clients benefit from the dynamic synergy between the firm's asset management and financial planning teams. "In the Chicago area—and across the country—there are plenty of registered investment advisors, but there is a tendency for firms to focus either on investments or financial planning; it's rare to find groups that excel at both sides of the equation," says Ted Rupp, principal and co-president of the firm. "Kovitz offers superb asset management in addition to wealth advisory and financial planning specialists that delve into taxation—many are CPAs—as well as evaluating insurance needs, estate, and legacy planning."

Many people try to manage their own money, but Kovitz believes there's no substitute for having a team of brilliant and experienced finance professionals one phone call away. Collaboration is a crucial part of the Kovitz process, and each client's dedicated team works alongside them to carefully craft the right plan.

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**KOVITZ**

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