

upshift

True North Advisors

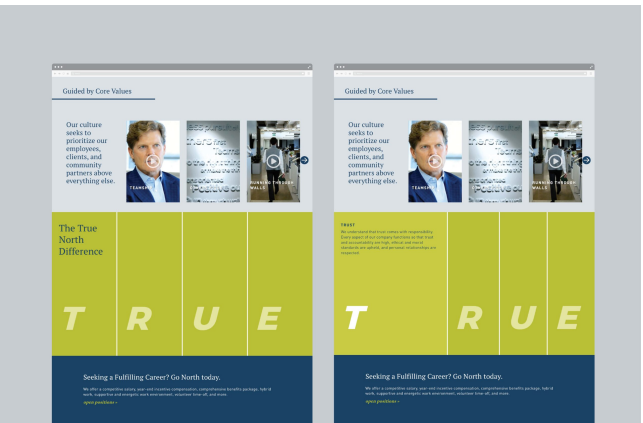
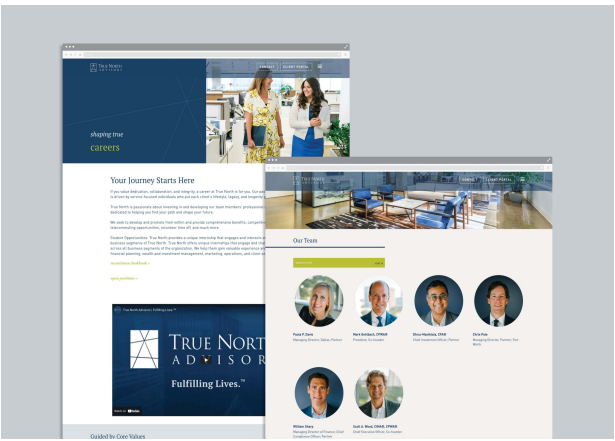
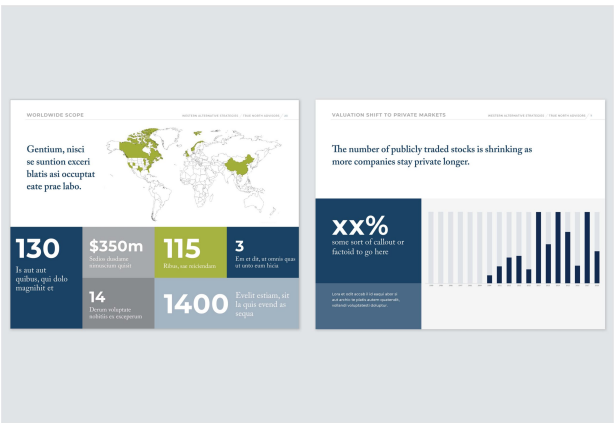
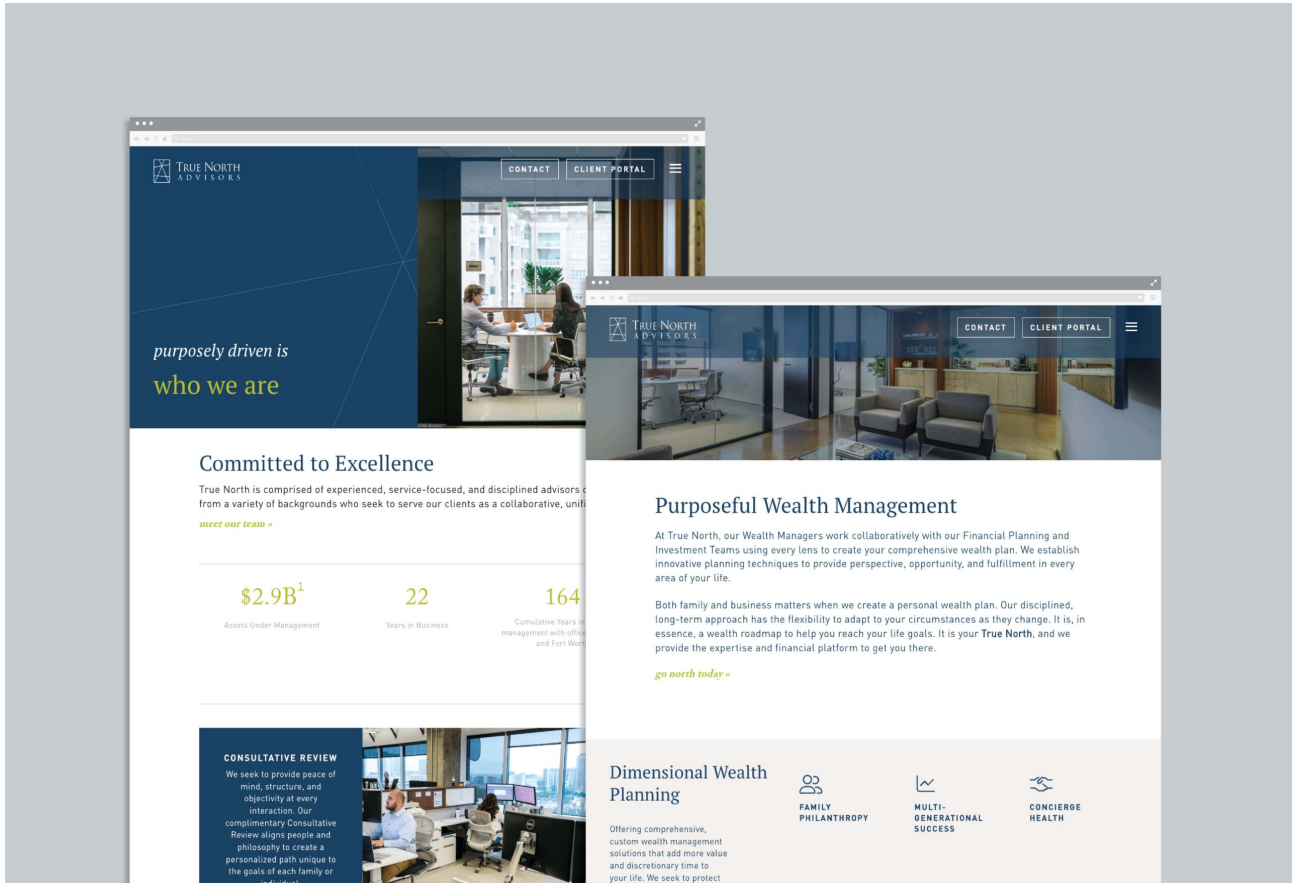
Wealth Management Firm Seeks Higher Return from their Brand

OBJECTIVE

True North sought a professional, creative website to reflect its independent spirit and respected wealth management expertise.

SOLUTION

UpShift refreshed key branding elements and improved sales tools before designing a custom, polished website. This new, easy-to-maintain site enhanced True North's image while providing an engaging, user-friendly experience. The redesign successfully attracted increased investments from high-net-worth individuals and businesses.



WESTERN ALTERNATIVE STRATEGIES

PRESENTED TO
Client Name

PRESENTED BY
First Lastname
Title Here

21 APRIL 2021

EXECUTIVE SUMMARY

Rio eum fuga. Itatiss untotat et, exerum que re nobis dolo occulpa rchillorpos rerum recus nonecuptatur.

High Valuations

Otat etusa serum quantibus, culpa si dolupta tibeation nimolup tation pe doloriam aut optat autate expercimet il eius apic tem vendelendis.

Fewer Public Companies

Erum dolore omnitia perspere violorum lacepilit diti re nihicile ariorit illi beritat lorehen ihilian dentiam nobit dolupta quibus ullatus editatur sintia.

Low Rates

Mil in reic to occus que nost atem ad elusaperia sandi tendignam eutesa berspererae resumquodit aiti et hortias secatio optat andaece rcilliant liquam aut la cuscip.

High Debt Levels

Pudam nobit, quisqui consend emporem acepe excerias eum quatius aut autem lasendis et vitati offictu ribersp eribea porundis eos mo magnimet.

WESTERN ALTERNATIVE STRATEGIES TRUE NORTH ADVISORS

Ximi, optatur asperum reiunt perupta tinist aut estiur, sum voluptatur sinvendunt velluptas qui bea culparum qui rem harum et facesti orectatus etur militis alique.

Global Private Strategies (GPS)

Henihit dolore cum quo lumquis imporia cum voloris estitici

Multi-Strategy

Henihit dolore cum quo lumquis imporia cum voloris estitici

Alternative Income

Henihit dolore cum quo lumquis imporia cum voloris estitici

Tail Risk

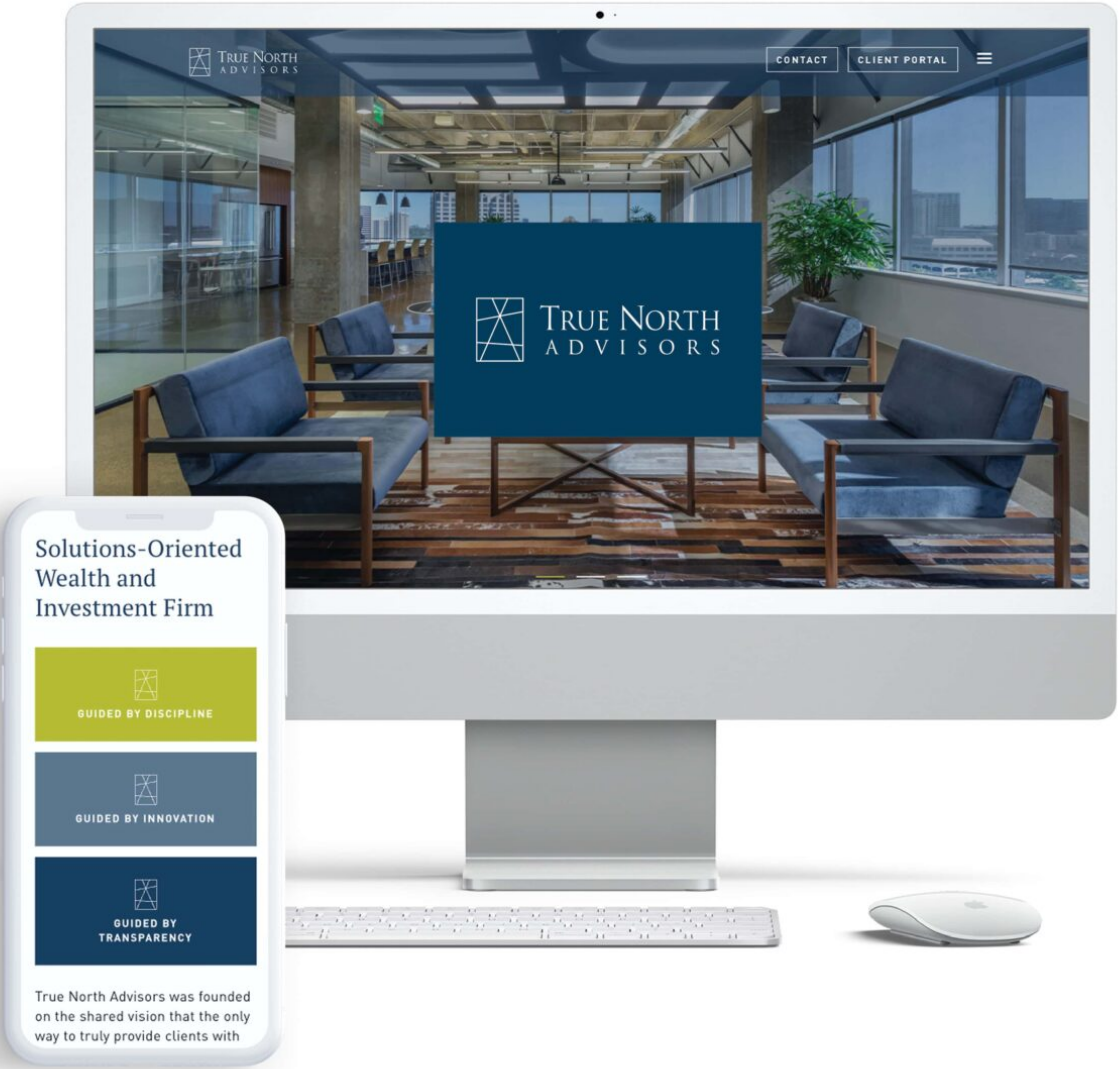
Henihit dolore cum quo lumquis imporia cum voloris estitici

OVERVIEW

Ad unt ilit aliquam, corem deleseq uodisquamus molest fugiati stiorep tatur. Fersperi autectio ipis num cusdae. Apid molenec.

- **Subhead Needed for These:** Menis eum non coreptas esti rerl cusda verunt hariae. Nam re la aut qui quam, sunt acereic tem earci.
- **Risk:** Tem earcide nihicidel eleste inum haruptati cum eost, illoreh endipsunt aborum.
- **Shocks:** Tem nonsequam ipsum quam quae omnim ratis min por sum illiquam, con poribus dandis magni dolectus.

continued



upshift

True North Advisors

Presentation Template

PRESENTED TO

Client Name

PRESENTED BY

First Lastname

Title Here

21 APRIL 2021

1930-1932

deflation

1970s

inflation

1871-2018

historical average

TRUE NORTH ADVISORS

WESTERN ALTERNATIVE STRATEGIES / TRUE NORTH ADVISORS / 11

it aliquam, corem deleseq uodisquamus
giati stiorep tatur. Fersperi autectio ipis
dae. Apid molenec.

eeded for These: Menis eum non coreptas esti reri cusda
ie. Nam re la aut qui quam, sunt acereic tem earci.
arcide nihicidel eleste inum haruptati cum eost, illoreh
aborum.
m nonsequam ipsum quam quae omnim ratis min por sum
n poribus dandis magni dolectus.

WESTERN ALTERNATIVE STRATEGIES / TRUE NORTH ADVISORS / 6

EXECUTIVE SUMMARY

Ximi, optatur asperum reiunt perupta
tinist aut estiur, sum voluptatur sinvendunt
velluptas qui bea culparum qui rem harum
et facesti orectatus etur militis alique.

Global Private Strategies (GPS)

Henihit dolore cum quo
iumquis imporia cum
voloris estiisci

Multi-Strategy

Henihit dolore cum quo
iumquis imporia cum
voloris estiisci

Alternative Income

Henihit dolore cum quo
iumquis imporia cum
voloris estiisci

Tail Risk

Henihit dolore cum quo
iumquis imporia cum
voloris estiisci

EXECUTIVE SUMMARY

Rio eum fuga. Itatiss untotat et,
exerum que re nobis dolo occulpa
rchillorpos rerum recus nonecuptatur.

High Valuations

Otat etusa serum
quantibus, culpa si
dolupta tibeation nimolup
tation pe doloriam aut
optat autate expcimet il
eius apic tem vendelendis.

Fewer Public Companies

Erum dolore omnitia
perspere voloreium
lacepelit ditis re nihiciis
ariorit iliti beritat iorehen
ihillan dentiam nobit
dolupta quibus ullatus
aditatur sintia.

Low Rates

Mil in reic to occus que
nost atem ad eiusaperia
sandi tendignam autasi
berspererae rerumquodit
alit et hictias secatio optat
andaece rcillant liquam
aut la cuspip.

WESTERN ALTERNATIVE STRATEGIES / TRUE NORTH ADVISORS / 23

WORLDWIDE SCOPE

Gentium, nisci
se suntion exceri
blatis asi occuptat
eate prae labo.

WESTERN ALTERNATIVE STRATEGIES / TRUE NORTH ADVISORS / 14

EXECUTIVE SUMMARY

Global Private Strategies

WESTERN ALTERNATIVE STRATEGIES / TRUE NORTH ADVISORS / 16

IVE STRATEGIES / TRUE NORTH ADVISORS / 16

GPS

Taspera siminv
ex et autem an
enistempore re
comnihit volo
optatur iassun

Philosophy

Equiatius as aut rer
nimodigent. Pori re
tatem ditium fugi

EXECUTIVE SUMMARY

WESTERN ALTERNATIVE STRATEGIES / TRUE NORTH ADVISORS / 5

Rio eum fuga. Itatiss untotat et,
exerum que re nobis dolo occulpa
rchillorpos rerum recus nonecuptatur.

High Valuations

Otat etusa serum
quantibus, culpa si
dolupta tibeation nimolup
tation pe doloriam aut
optat autate expereimet il
eius apic tem vendelendis.

Fewer Public Companies

Erum dolore omnitia
perspere voloreium
lacepelit ditis re nihiciis
ariorit iliti beritat iorehen
ihillan dentiam nobit
dolupta quibus ullatus
aditatur sintia.

Low Rates

Mil in reic to occus que
nost atem ad eiusaperia
sandi tendignam autasi
berspererae rerumquodit
alit et hictias secatio optat
andaece rcillant liquam
aut la cuscip.

High Debt Levels

Pudam nobit, quisqui
consend emporem acepe
excerias eum quatius
aut autem latendis et
vitati offictu ribersp
eribea porundis eos mo
magnimet.

EXECUTIVE SUMMARY

WESTERN ALTERNATIVE STRATEGIES / TRUE NORTH ADVISORS / 6

Ximi, optatur asperum reiunt perupta
tinist aut estiur, sum voluptatur sinvendunt
velluptas qui bea culparum qui rem harum
et facesti orectatus etur militis alique.

Global Private Strategies (GPS)

Henihit dolore cum quo
iumquis imporia cum
voloris estiisci

Multi-Strategy

Henihit dolore cum quo
iumquis imporia cum
voloris estiisci

Alternative Income

Henihit dolore cum quo
iumquis imporia cum
voloris estiisci

Tail Risk

Henihit dolore cum quo
iumquis imporia cum
voloris estiisci

THE TRUE NORTH DIFFERENCE

WESTERN ALTERNATIVE STRATEGIES / TRUE NORTH ADVISORS / 13

Optional headline here

ACCESS
Beatae conem idel moluptate mo erum voloribus aut dest qui cust, ipsum ut lat iumenis et unt

SIZE
Beatae conem idel moluptate mo erum voloribus aut dest qui cust, ipsum ut.

TURNKEY SOLUTION
Ga. Et quo dolesequid qui cullore sandem. Nam es que Cidit estium ex eventem que vid ut eveliquia coreiur.

EXPERIENCE
100+ hitata delit aut et qui non et es suntinit, conest, to consequia nonsequis eum.

SOURCING
Sundignit eosa et omni core nam, con pedissit aliatem porporemquis doluptaspe con et, que qui destis vendipsa prepeditatus invellab imus.

SKIN IN THE GAME
Sundignit eosa et omni core nam, con pedissit aliatem porporemquis doluptaspe con et, que qui destis vendipsa prepeditatus invellab imus.

FEES
Erum aut andions ernam, quis pa dolupis Aspellor essunt. Taepudam facest.

OPPORTUNISTIC
Ento ipsundi tatiur? Uptaten digenihil erisit, cor sum ditat quae volor saererovidi Cus moluptatu. Itiaturehenet od et parum eum re et.

DIVERSIFICATION
Ento ipsundi tatiur? Uptaten digenihil erisit, cor sum ditat quae volor saererovidi Cus moluptatu.

TERMS	
WESTERN ALTERNATIVE STRATEGIES / TRUE NORTH ADVISORS / 18	
fund	Si natur acero qus pa core Il intem reriataquid que
minimum investment	Si natur acero quaspit atisit quibus pa core
management fees	Si natur acero quaspitOd quia delitiam acilliq
performance fee	Si natur acero quaspit atisit quibus pa core
subscriptions	Unt a cus. Cidest, quid quundunt hiciiti comnis con
term	Si natur acero quaspitOd quia delitiam acilliquos rest fugiass edipientem. Ulliquibus dolum ipt
return target	Si natur acero quaspit atisit quibus pa core
investor qualification	Si natur acero qus pa core Il intem reriataquid que



EXECUTIVE SUMMARY

WESTERN ALTERNATIVE STRATEGIES / TRUE NORTH ADVISORS / 19

Multi-Strategy

Global Private Strategies (GPS)

Multi-Strategy

Alternative Income

Tail Risk Strategy

IMPLEMENTATION

WESTERN ALTERNATIVE STRATEGIES / TRUE NORTH ADVISORS / 22

Delessit atibusaepudi nonsequae
ped eaqui rerori id et est, ium et
as aut pratis erferna tiatur susam
quosa sanducil inctur aperios

\$98

Some
Callout
Here

SOME SUBHEAD HERE

Dollibus atiundi con
eosant laborro et
faceat ut dionseq
uibuscium cuptam,
offici doluptaqui
doluptatia quiaepudit
dunt lis et quat

Magnam, to iur
aut quae vitem
enecaborro es iundis
molorporis exeribusae
vendelectur rem et
et doluptatus eiur
alignat andellantium

Abo. Met voluptat.
Ur, nest ab in rem
ne nonsedi dionseq
uibuscium cuptam,
offici doluptaqui
doluptatia quiaepudit
dunt lis et quat

\$2

Title Here

TIMELINE

WESTERN ALTERNATIVE STRATEGIES / TRUE NORTH ADVISORS / 24

Fic temporrovit, saeptas dis sum
velenecum imilitae re lam harum ut
voluptam il ius pa sum et, quatquiatium
estinctus mintio. Ut faccat moloratum.

2002

Pitibus et fuga.
Ugia vellent
andem

2011

Nos maximost,
ut expliqui temo
et voluptatur as
doluptatur

2013

At lab ipsamusti
ipienecae

2019

Pitibus et fuga.
Ugia vellent
andem

2020

Nos maximost,
ut expliqui temo
et voluptatur as
doluptatur

2021

At lab ipsamusti
ipienecae

Pitibus et fuga.
Ugia vellent
andem

OUR PROCESS

WESTERN ALTERNATIVE STRATEGIES / TRUE NORTH ADVISORS / 25

Is sectios et posant molorer oremquibea
solutpat rernamus commimet libus
placcaborat laboreptatis antibus si.

LEADS & SOURCING

Some Headline Here

Magniendem corent
voluptatibus ent quaspe vel
inverum aut et quis perores
re, se nonse et volendio. Ut
ipsus niae liqui autemolorum
voloris qui to moluptas eum
iunt expero occusam, conem ut
arit, optionsent quo bea veressi
nctotat empore ipsam quam
eatempo repernati te et re

OPPORTUNITIES

Some Headline Here

Magniendem corent
voluptatibus ent quaspe vel
inverum aut et quis

Perores re, se nonse et volendio.
Ut ipsus niae liqui autemolorum
voloris qui to moluptas eum iunt
expereo occusam

Conem ut arit, optionsent quo
bea veresrepernati te et re

DEEP DIVE & IC

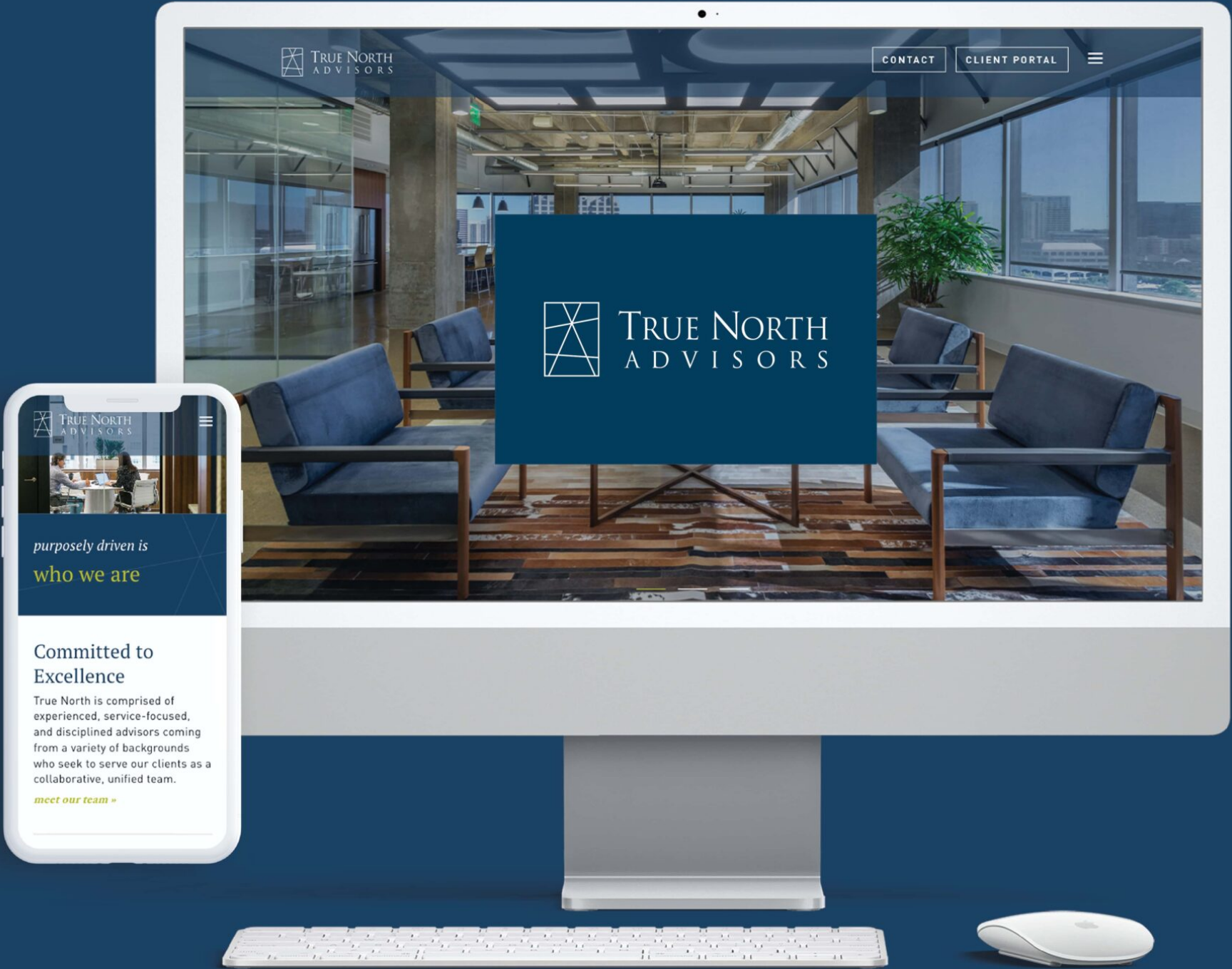
Some Headline Here

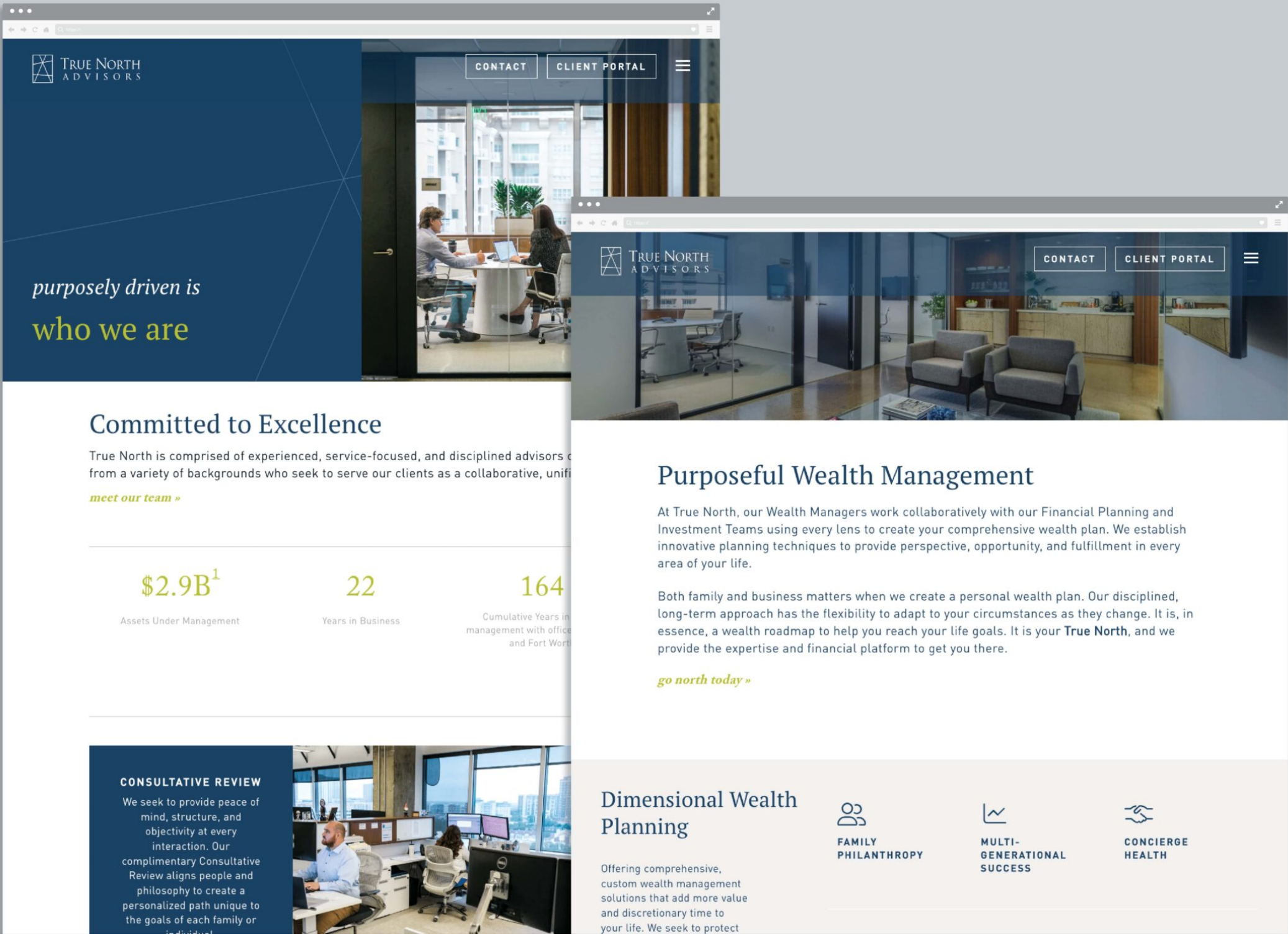
Magniendem corent
voluptatibus ent quaspe vel
inverum aut et quis perores re,
se nonse et volendio

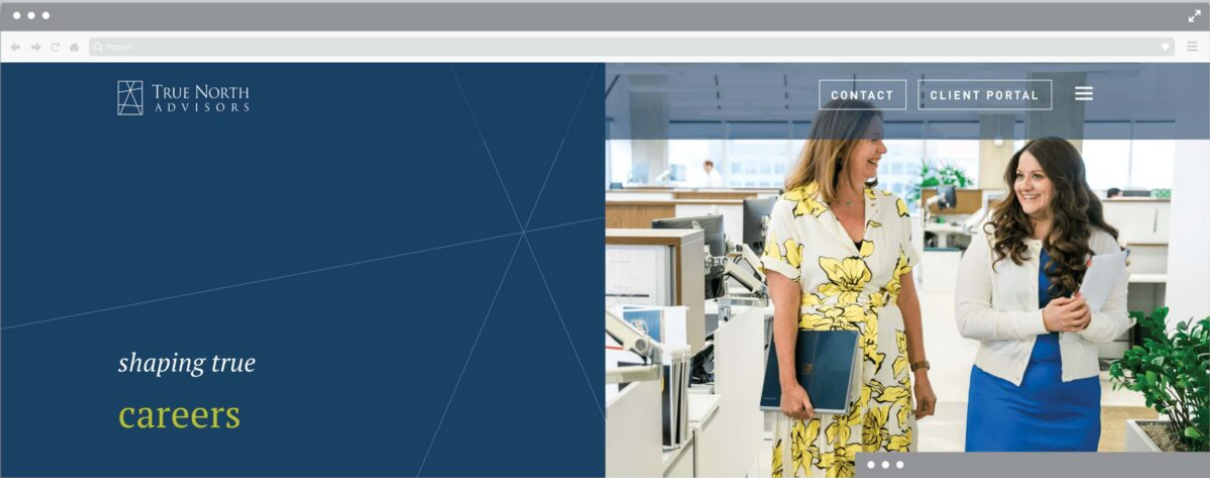
Ut ipsus niae liqui autemolorum
voloris qui to mola veressi
nctotat empore ipsam quam
eatempo repernati te et re

True North Advisors

Desktop & Mobile Website







Your Journey Starts Here

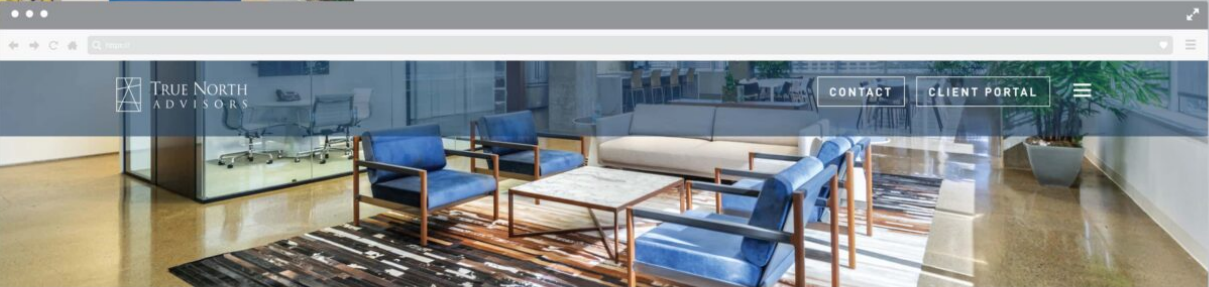
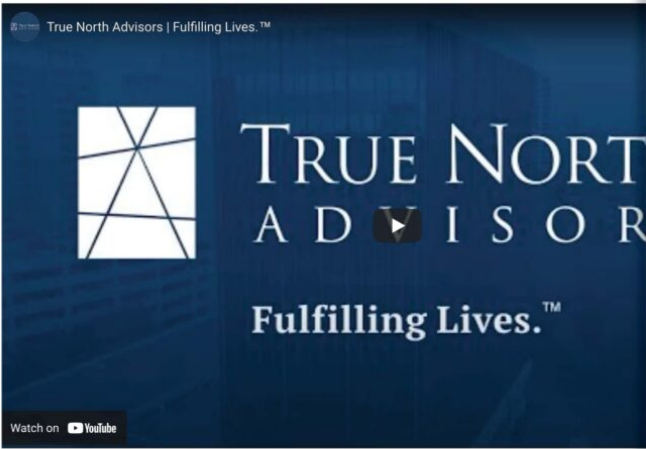
If you value dedication, collaboration, and integrity, a career at True North is for you. Our past is driven by service-focused individuals who put each client's lifestyle, legacy, and longevity first. True North is passionate about investing in and developing our team members' professional careers, dedicated to helping you find your path and shape your future.

We seek to develop and promote from within and provide comprehensive benefits, competitive salaries, telecommuting opportunities, volunteer time off, and much more.

Student Opportunities: True North provides a unique internship that engages and interacts students across all business segments of the organization. We help them gain valuable experience and financial planning, wealth and investment management, marketing, operations, and client service.

[recruitment lookbook »](#)

[open positions »](#)



Our Team

EXECUTIVE SORT



Paula P. Davis
Managing Director, Dallas; Partner



Mark Gehlbach, CPWA®
President, Co-founder



Dhruv Maniktala, CFA®
Chief Investment Officer; Partner



Chris Pate
Managing Director, Partner; Fort Worth



William Sharp
Managing Director of Finance; Chief Compliance Officer; Partner



Scott A. Wood, CIMA®, CPWA®
Chief Executive Officer, Co-founder

