



# THE ETHOS OF **Generation** CAPITAL ADVISORS

This ethos is more than just words;  
it is a commitment we live by daily, guiding our actions  
and shaping our identity as a company.

# When Generation Capital Advisors was founded, we had the rare opportunity to start with a blank slate.

## We asked fundamental questions:

- **Who are we?**
- **What do we stand for?**
- **Who do we serve?**
- **Most importantly, what kind of firm do we want to be for families to trust us with their life's work?**

As we have grown – in people, perspective, and responsibility – our ethos has grown with us. What has not changed is our belief that great wealth management is not about products or performance in isolation.

*It is about people, stewardship, and doing the right thing consistently over long periods of time.*

This document reflects who we are today: a team united by service, curiosity, discipline, courage, and care, operating at an elite level while never losing sight of the human beings we serve.

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## Our Mission

At Generation Capital Advisors, we partner with families to thoughtfully structure, preserve, and steward wealth across generations.

Our role is to simplify complexity, coordinate every aspect of a client's financial life, and free our clients to focus on their most valuable asset – their time. Through deep planning, disciplined investment management, and close collaboration with trusted advisors, we provide clarity, confidence, and continuity.

While financial outcomes are paramount, our responsibility goes far beyond returns. We are entrusted with people's life work, and we take that responsibility seriously – standing alongside our clients and their families through moments of opportunity, uncertainty, and transition with clarity, care, and conviction. We don't just manage money, we manage people's money.

## Our Ethos

Our ethos is the set of principles that guide how we think, how we act, and how we serve. It shapes our culture internally and defines our experience externally. Every decision we make is filtered through these values.

# Our Core Values



## Honesty and Integrity

Integrity is non-negotiable. We believe trust is earned through truthfulness, clear communication, and doing what is right – not what is easy or expedient. Our advice is grounded in objectivity and long-term alignment.



## Reliability and Accountability

We do what we say we will do, when we say we will do it. Our clients and teammates know they can rely on us – in moments of opportunity and moments of urgency. We take pride in being dependable, proactive, and prepared.



## Service Excellence

We are relentlessly committed to delivering an exceptional experience at every stage of the client relationship. We take ownership, act with urgency, and hold ourselves to uncompromising standards. Our clients should always feel supported, heard, and confident that nothing has been overlooked. White-glove service is not an aspiration – it is our baseline.



## Courage

Courage means having honest conversations, making disciplined decisions, and prioritizing long-term outcomes over short-term comfort. It requires challenging conventional thinking, embracing change, and stepping outside our comfort zone in pursuit of better solutions.



## Family First

We respect the importance of balance, relationships, and life beyond work. Supporting our team's families strengthens our ability to care for our clients' families with the same level of thoughtfulness and commitment.



## Generational Focus

Our work is designed to provide continuity across lifetimes – helping families navigate transitions, educate future generations, and preserve wealth with intention and purpose.



## Persistence and Long-Term Thinking

We are patient, disciplined, and committed to long-term success. We do not chase short-term outcomes at the expense of durable progress. Our perspective is measured in years and generations, not quarters.

# Our Core Values



## Curiosity

Curiosity keeps us open-minded, adaptable, and continuously improving. We recognize that people, markets, and lives are multifaceted. By staying curious – about our clients, our craft, and the world around us – we uncover opportunities others miss and grow in unexpected ways.



## Education and Continuous Learning

We believe continuous education is essential to serving clients at the highest level. Markets evolve, tax laws change, and planning strategies advance – and so must we. We invest heavily in learning so our clients benefit from thoughtful, informed, and forward-looking advice.



## Hard Work

We take pride in outworking expectations, not for recognition, but because our clients deserve diligence and care commensurate with the responsibility they entrust to us.



## Teamwork

Collaboration, respect, and shared accountability define how we operate. We grow collectively, support one another, and recognize that the best outcomes are achieved through unified effort.



## Leadership

We cultivate leadership at every level – encouraging initiative, ownership, and sound judgment. We strive to lead by example, both within our firm and in the broader communities we serve.



## Kindness

We treat clients, teammates, partners, and communities with respect and care. We listen before we speak, we ask how people are doing, and we recognize that trust is built through small, consistent acts of decency.



## Giving Back

We believe financial success carries a responsibility to contribute positively to the broader community. Through financial education, charitable engagement, and service-oriented initiatives, we aim to create impact beyond balance sheets. Giving back is not a program – it is a reflection of our values.

# Our promise to every client and family we serve:

We strive to manage your wealth with the same care and diligence we bring to our own financial decisions.

To act with care, humility, and discipline.

To earn your trust through consistency, clarity, and service that exceeds expectations.

**This is the standard we hold ourselves to – today and for generations to come.**





**“Those who stand  
for nothing fall for  
anything.”**

**– Alexander Hamilton**