



Wealth Advisory Fact Sheet

About DCM Advisors

DCM Advisors, LLC (DCM) is an SEC registered investment advisory firm. DCM provides asset management and wealth advisory services to institutions, registered investment advisors, family offices and high net worth individuals. Additionally, DCM is affiliated with Lisanti Capital Growth, LLC (Lisanti), a certified woman-owned and managed SEC registered investment advisor specializing in small and small/mid-cap (SMID) growth investing.

In addition to wealth advisory services, current DCM and Lisanti asset management portfolio strategies include Global Equity, International Equity, U.S. Small Cap Growth Equity, U.S. SMID Cap Growth Equity and U.S. Municipal Bonds. Lisanti is also the investment advisor to the Lisanti Small Cap Growth Fund (ASCGX). In addition, DCM provides research subscription and advisory services to institutional clients related to global and international markets, including offering recommendations as to country and sector allocation.

Contact Us:

For DCM:

inquiries@dcmadvisors.com
www.dcmadvisors.com

For Lisanti:

info@lisanticap.com
www.lisanticap.com
www.lisantismallcap.com

475 Park Avenue South, 9th Floor
New York, NY 10016
(917) 386-6260

Wealth Management

Whether their goal is to construct an equity, fixed income or balanced portfolio, DCM Advisors, LLC (DCM) wealth advisors help clients define their wealth management objectives and then design a customized portfolio strategy to achieve them. The key aspect of a DCM wealth advisor relationship is a thoroughly integrated strategic thought process based on a complete view of your financial picture, wherever accounts are held. Although each client's investment plan is customized, DCM's wealth advisors conduct regular reviews of each client's portfolio to assure that the client is receiving individualized and appropriate investment advice.

Wealth Advisory Services *(services may be provided in Spanish upon request)*

Wealth Planning

- Comprehensive cash flow analysis, budgeting, liability management and risk mitigation
- Family, education and estate planning
- Corporate trustee review
- Asset location and protection
- Tax optimization
- Family wealth education

Investment Advisory

- Investment planning and investment policy statement
- Asset allocation and portfolio construction
- Investment manager selection including equities and fixed income
- Insurance products, including fixed and variable life and annuities

Business Advisory

- Financing advice
- Employer retirement plans

Wealth Advisor Team

Steven Roseman, Wealth Management Advisor

Manuel Choy, CFP®, MBA, Wealth Management Advisor

William Gamello, Wealth Management Advisor



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DCM does not guarantee the results of its advice or recommendations. Investments in securities are subject to investment risk, including possible loss of principal. Prices of securities may fluctuate from time to time and may even become valueless. Before making any investment decision, investors should read and consider all the relevant investment product information. Investors should seriously consider if an investment is suitable for them by referencing their own financial position, investment objectives, and risk profile before making any investment decision. There can be no assurance that any financial strategy will be successful.

Disclaimers: DCM is an SEC registered investment advisor under the Investment Advisers Act of 1940 ("Advisers Act"). Under the Advisers Act, Rule 204-3 requires DCM to provide clients with specific information about the advisory firm. DCM offers ADV, Part 2 to serve this important purpose. Investors can acquire information (ADV, Part 2) on the registration status of our investment advisory firm by calling DCM directly at (917) 386-6260 or visiting the SEC's website at www.adviserinfo.sec.gov.

DCM is a wholly owned subsidiary of Dinosaur Group Holdings, LLC. Lisanti Capital Growth, LLC, a certified woman-owned and managed SEC registered investment advisor, is an affiliate of DCM. Neither the information provided nor any opinion expressed constitutes a solicitation for the purchase or sale of any security. The investments and investment strategies identified herein may not be suitable for all investors. The appropriateness of a particular investment will depend upon an investor's individual circumstances and objectives.