



For Immediate Release

Date: November 1, 2024

Announcing Vidarrow: A New RIA Firm Empowering Individuals, Businesses and Non-Profit Clients Through Personalized Financial Guidance

Arlington Heights, Illinois - Vidarrow, a new Registered Investment Advisor (RIA) firm, is excited to announce its official launch on November 1, 2024. Vidarrow is dedicated to providing personalized financial planning and investment services to individuals and families, businesses and non-profits.

With a focus on building trusted client relationships, Vidarrow offers a comprehensive suite of services, including:

- **For Individuals and Families:**
 - **Investment Management:** Developing diversified investment portfolios that align with clients' risk tolerance and objectives.
 - **Tax Optimization:** Utilizing tax-efficient strategies to minimize clients' tax liabilities now and in the future.
 - **Retirement Planning:** Creating tailored retirement strategies to help clients achieve their financial goals and manage the Required Minimum Distributions (RMDs).
 - **Estate Planning:** Assisting clients in preserving their wealth and ensuring a smooth transition of assets to future generations.
- **For Businesses and Non-Profits:**
 - **Retirement Plan Services:** For businesses offering employee retirement plans (e.g., 401(k)), Vidarrow can help with plan design, investment options, and participant education. Specifically, they offer both 3(21) and 3(38) fiduciary services to ensure compliance and participant education.
 - **Investment Policy Development:** Vidarrow can collaborate with non-profit leadership and Boards to develop a formal investment policy statement (IPS) that outlines the organization's investment objectives, risk tolerance, and investment guidelines.
 - **Investment Management:** Vidarrow offers comprehensive portfolio development and management services, including customized investment strategies, asset allocation optimization, and ongoing monitoring and rebalancing to meet the specific needs and risk tolerance of businesses.

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- **Financial Planning and Analysis:** Vidarrow can assist businesses in creating financial models and forecasts to understand their future financial and cash position. This can be crucial for budgeting, resource allocation, strategic planning, and making informed financial decisions.
- **Endowment Management:** Vidarrow can be helpful with managing endowment funds. We can create investment plans that support the long-term growth of the endowment while adhering to the organization's risk tolerance.
- **Donor Advised Funds (DAF):** Vidarrow can advise non-profits on how to best attract charitable contributions / Donor Advised Funds (DAFs).

Vidarrow's team includes Certified Public Accountants, Personal Financial Specialists and Investment Advisor Representatives. By combining personalized attention with award-winning technology, Vidarrow aims to empower clients to make informed decisions about their financial future.

"We are thrilled to launch Vidarrow and provide our clients with the highest level of financial guidance and support," said Luke Sauter, President and CEO at Vidarrow. "Our goal is to build lasting relationships based on trust, transparency, and exceptional service."

For more information about Vidarrow and its services, please visit www.vidarrow.com or call us at 866-986-9029 or 224-864-8663.

About Vidarrow

Vidarrow is a Registered Investment Advisor (RIA) firm dedicated to providing personalized financial planning and investment services. With a focus on building strong client relationships, Vidarrow offers a comprehensive suite of services tailored to meet individual needs.

Disclosures

Vidarrow ("Vidarrow Investment Advisors") is a registered investment advisor offering advisory services in the State of Illinois and in other jurisdictions where exempt. Registration does not imply a certain level of skill or training. The information in this press release is not intended as tax, accounting or legal advice, as an offer or solicitation of an offer to buy or sell, or as an endorsement of any company, security, fund, or other securities or non-securities offering. This information should not be relied upon as the sole factor in an investment making decision. Past performance is no indication of future results. Investment in securities involves significant risk and has the potential for partial or complete loss of funds invested. It should not be assumed that any recommendations made will be profitable or equal any performance noted on this site. The information in this press release is provided "AS IS" and without warranties of any kind either express or implied. To the fullest extent permissible pursuant to applicable laws,

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