

# Sarah M. Lewis

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***Aequitas (Latin) [ek wit as] objective, impartial, honest***

***Aequitas defines the principles that govern the relationships we create with our Clients.***



***As an independent "fee-only" advisor, our aim is for you to experience investing in a manner that is understandable and designed to achieve your objectives.***

## Aequitas Wealth Management

We manage investment portfolios and provide financial planning advice to build and preserve the wealth of senior professionals and entrepreneurs who have complex financial planning issues or investments.

Four unique qualities set us apart from conventional financial advisors:

1. **Independence:** Our complete independence from any bank, insurance company, or brokerage firm ensures that our advice is unbiased and free from hidden fees and incentives to promote certain investments or recommendations.
2. **Fee-only:** We receive no commissions or third-party payments, and we have no financial interest in any services or investment products we recommend.
3. **Lifetime planning and education:** We provide on-going personal financial planning, education and advice as part of our portfolio management fee.
4. **No sub-contracting:** We directly manage our clients' investments and do not sub-contract to third party managers or propose one size fits all lifestyle solutions. Each portfolio is designed for a client's specific objectives and constraints including tax consequences.



With more than 20 years in the banking and finance industry, **Sarah Lewis** has the experience and understanding of the importance of the *Aequitas* principles. She has worked for top tier banks and consulting firms in the U.S. and Europe and lived in New York, Paris, Amsterdam and Oslo. She is drawn to the dynamics of multi-culturalism, speaks French and holds a MBA and CFP®.

Discover more at [www.aequitasllc.com](http://www.aequitasllc.com)