

Concurrent Investment Advisors, LLC

DBA: Eagle Capital Advisors

Communication Disclosures

Disclosure:

Important Disclosures

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These Terms were last updated on November 21, 2022.

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Different types of investments involve varying degrees of risk. Therefore, it should not be assumed that future performance of any specific investment or investment strategy will be profitable.

Asset allocation may be used in an effort to manage risk and enhance returns. It does not, however, guarantee a profit or protect against loss. Performance of the asset allocation strategies depends on the underlying investments.

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is not intended to offer or deliver investment advice in any way. Information regarding investment services are provided solely to gain an understanding of our investment philosophy, our strategies and to be able to contact us for further information.

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Brokerage Services offered through Purshe Kaplan Sterling Investments (PKS), Member FINRA/SIPC Headquartered at 80 State Street, Albany, NY 12207. PKS and Concurrent are not affiliated companies. Investments through PKS or RIA are: NOT FDIC INSURED NOT BANK GUARANTEED MAY LOSE VALUE, INCLUDING LOSS OF PRINCIPAL NOT INSURED BY ANY STATE OR FEDERAL AGENCY

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For a copy of the Concurrent Privacy Policy, please click [HERE](#).

Email Disclosures

Eagle Capital Advisors and Concurrent often communicate with its clients and prospective clients through electronic mail (“email”) and other electronic means. Your privacy and security are very important to us. Eagle Capital Advisors and Concurrent make every effort to ensure that email communications do not contain sensitive information. We remind our clients and others not to send private information over email. If you have sensitive data to deliver to us, we can provide secure means for such delivery.

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