



**Wealth Management Built
on Integrity and Experience**

Timothy P. Dooling, CFA

Registered Investment Advisor

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Firm Profile

Established: 2001

Experience: 21 Years of Investment Experience

My approach is designed to be more valuable to clients than traditional investment advisors. I provide institutional quality analysis and advice at a low cost.

Fees and Taxes are the largest obstacle to achieving your financial goals. I seek to minimize both.

A Partner with Proven Expertise

For more than 20 years, Tim Dooling has served as a trusted partner of individuals and families, providing wealth management guidance and solutions based on a thorough understanding of each client's situation and goals. I take an objective and proactive approach, bringing proven expertise to bear on every aspect of a client's wealth—from accumulation and growth through preservation and distribution.

The Power of a Holistic Approach

My approach is designed to create a plan that achieves your near- and long-term goals, whether you are seeking fundamental investment management, need to ensure the orderly succession of ownership for a family business, are providing care for an aging family member, or are looking to establish a philanthropic legacy that makes a difference in your community.

When crafting an integrated wealth management plan, we offer expertise in:

- Financial planning
- Retirement income planning
- Estate planning
- Tax planning
- Business succession
- Intergenerational wealth transfer
- Philanthropy

How I Work with You

As a client, you will benefit from a collaborative relationship that addresses—and anticipates—your needs. We will follow a disciplined wealth management process that provides a structured approach, while allowing for customization as your situation demands.



Why Invest with Tim?

I've had the privilege of working with individuals and families for over 20 years, often over several generations. In that time, I've learned that clients value and appreciate the combination of traits that distinguish my services.

Market Knowledge: Since 2001, I have provided wealth management for clients through a wide range of market conditions. This track record of experience continues to inform our prudent approach and long-term perspective.

Expertise: Every client benefits from a career's worth of investment experience.

100% Independent Advice: I pride myself on providing an objective point of view, without the distraction of conflicts of interest. My goals and those of clients are one and the same.

Personal Relationships: My clients experience only one kind of relationship—the kind based on deep understanding and mutual respect. Such relationships are, in our experience, fundamental to the success of every wealth management plan.

Custody of Assets

It is paramount that clients be comfortable with where their assets are held. I work with a variety of custodian banks, and I hold no custody of any client assets. Keep your assets wherever you like and feel comfortable, I'll provide the investment advice.

Institutional Thinking for Individual Investors

I believe that individuals and families with significant wealth can benefit from the rigor and sophistication that typically characterize institutional portfolio management. My approach to managing client assets is rooted in the following core strengths:

Deep understanding. Before we invest any money, we determine a client's goals, tolerance for risk, and time horizon. We measure these factors against our extensive knowledge of investments. Only then do we consider asset allocation and diversification.

Disciplined portfolio construction. Based on the specifics of each client's situation, we provide exposure to an appropriate mix of traditional and nontraditional assets. We also seek to provide diversification within each asset class—across sectors, industries, and countries.

Rigorous oversight. When implementing a client's investment strategy, we use a stringent process to screen top money managers, selecting those who meet the objectives established for the client. Once the appropriate managers have been chosen, we provide ongoing oversight and make changes as necessary.

It Starts with a Conversation

To learn how you can benefit from wealth management based on integrity and experience, please contact me at tim@nisland.com or 858-775-9277



Why the CFA Credential Matters

Today's financial markets demonstrate the importance of having reliable evidence of your financial adviser's integrity, experience, and commitment. Among the credentials that financial professionals may hold, none are more highly regarded than or as rigorously focused on investment knowledge as the Chartered Financial Analyst® designation. Tim Dooling is a CFA charterholder and embodies the following core tenets:

Ethics

Ethics are a core component of the curriculum that leads to the CFA designation. Every CFA charterholder is required to annually sign a statement declaring adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct.

Knowledge and Experience

Every CFA charterholder has at least four years of industry experience and has passed 18 hours of rigorous examinations on subjects that include investment tools, asset valuation, portfolio management, and the application of ethical and professional standards.

Global Relevance

The CFA charter has become the global professional investment credential. There are CFA charterholders in more than 130 countries, with increasing demand worldwide for the CFA program.

Recognition

The Economist has called the CFA credential the "gold standard" of the investment industry. Respect for the program's professional standards has made the CFA designation the mark of distinction for investment professionals worldwide.

www.CFAInstitute.org

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