EVYAVAN
Advisory Services LLC

Passionately connecting your **financial dreams.**

Dedicated to serving high-net-worth individuals and families of Indian and South Asian origin

At Evyavan Advisory Services, our clients are family.

We take the time to get to know you so that we can develop a strategy according to your specific needs and circumstances. We learn about the hardships, sufferings, and pains that went into the making of each dollar. Your unique life circumstances allow for your story to inspire and motivate us in the careful and successful management of your accounts.

Our guiding principles

We believe that a comprehensive financial plan is the foundation on which success is built. As an independent boutique investment management services firm, we offer a wide array of products and services to pursue your unique goals and aspirations. Our infrastructure is designed to ensure our clients are in the best hands possible, leveraging the knowledge and experience of our team, our broad network, and platform.

We put your interests first—we start by understanding your financial goals and building a relationship based on trust and transparency. In combination with our high-touch, personalized approach, and decades of experience to help you design a custom-tailored financial plan that will guide you through your career and into retirement. And most importantly, give you the freedom to focus on what matters to you most.

We offer partnership, support, education, and guidance so you can successfully navigate an increasingly complicated financial landscape. Our relationship with LPL provides an abundance of resources and tools to deliver effective and industry-leading white-glove experiences.

We're here to help you reach your most important financial goals

For more than 25 years, we have specialized in serving the specific needs of high-net-worth individuals and families of Indian and South Asian origin. Giving us greater insight and acumen in understanding your unique financial planning needs.

As a high-net-worth investor, financial situations can be exponentially complex. Our dedicated team and specialized services can address for even your most sophisticated needs—whether your goals include investment management, retirement readiness, tax reduction, estate planning, business analysis, education savings, or philanthropy, we can help you create a roadmap to success.

Our clients represent a mix of:

- Individuals and Families
- Physicians & Medical Professionals
- Corporate Executives
- Entrepreneurs
- Founders
- Business Owners

We don't believe in cookie-cutter financial planning.

Our approach is personal and crafted for you—aligning with your values, aspirations, concerns, and dreams. Through this collaborative approach, we identify the appropriate strategies to help you pursue your desired outcomes.

We Listen
We begin with a discovery process that will help identify, articulate, and prioritize your goals.

We Create a Plan
In partnership with you, we create a comprehensive and personalized strategy designed to help you work towards your goals.

We Implement
Once you choose the investment options that align with your goals, we create a personalized financial roadmap and implement the strategy.

We Monitor and Adjust
Together, we will monitor your plan to ensure that the strategy is effective and relevant in helping you pursue your lifetime goals.

Our financial strategies are tailored to match your individual needs.

You can depend on our independent insights and customized guidance to help you make a plan to protect your legacy and preserve your hard-earned wealth for generations.

- Wealth Management
- Tax Planning
- Risk Management
- Financial Planning
- Retirement Planning
- Corporate Services
- Estate Planning

When you choose Evyavan Advisory Services, you'll experience a level of service and personalized attention that is unmatched. You come first, we're committed to getting to know you, your life, and your family—both, financial intricacies, and the personal dynamics—and work in partnership with you to help you pursue your personal and financial goals.

You need a partner who will walk alongside you as you navigate through the financial complexities faced by most high-net-worth investors. We proudly serve as this partner—we're dedicated to providing high-quality services that help you work to expand your wealth and pursue long-term financial stability.

Leverage our resources to help you:

- Plan for generational wealth transfer
- Establish a charitable giving strategy
- Leave a legacy with tax and estate planning strategies
- Prepare for the unknown with succession and transition planning
- Retire with confidence

At every life stage, we partner with you to plan for opportunities to build, grow, protect, and preserve your wealth.

Tej Patel
President and CEO

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Tejaswi S. Patel (Tej, President and CEO of Evyavan Advisory Services has been in the financial services industry for over 25 years. He has served as Vice President for the Private Wealth Management group at Deutsche Bank, and prior to his time at Deutsche Bank, he served as Vice President at First Union Securities (now Wells Fargo). Through his experience, he has acquired valuable skills, developed key network and industry connections, and formed insightful investment perspectives.

When he founded Evyavan Advisory Services in 2003, he made a vow to reinvent the way clients experience wealth management.
Tej offers the following: a truly personalized approach, custom tailored portfolios, and an independent investment policy. Dedicated to serving the unique needs of high net-worth individuals and families of Indian and South Asian origin, Tej understands the unique tax, professional, and legal challenges that one could face. Over the course of his career, Tej has developed the knowledge and experience to create strategies for complex needs.

Tej's formal education includes a Master of Science in Engineering Management Studies from Drexel University, as well as a Bachelor of Science degree in Electrical Engineering (Instrumentation & Control) from India.

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