

# REGIS<sup>MEDIA</sup>

*Independence*  
ADVISORS, LLC

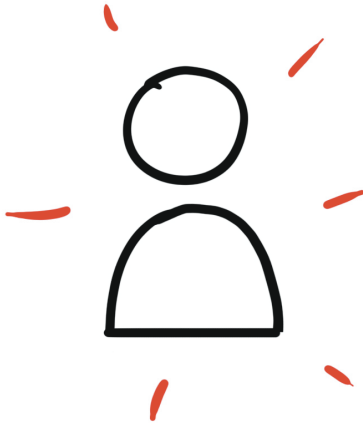
## **Project Storyboard**

Independence Advisors - Jake DeKinder Series

## **Video 3**

Implementation requires expertise

1a



**Script**

We believe that one of the reasons our clients have a successful investment experience is that we use a cost effective, evidence-based, and efficient process that is continuously evaluated.

Scene description

The client is revealed in time with the VO.

1b



**Script**

See panel #1a

Scene description

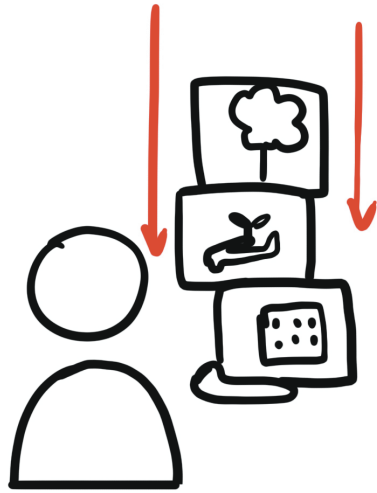
Three icons reveal around the client.

Cost effective = Light bulb with dollar sign.

Evidence - based = document with a green tick.

efficient process = Bar graph with an upwards arrow.

2a



**Script**

We aim to capture the higher expected returns delivered by certain types of stocks - specifically small stocks, value stocks, and stocks of highly profitable companies.

Scene description

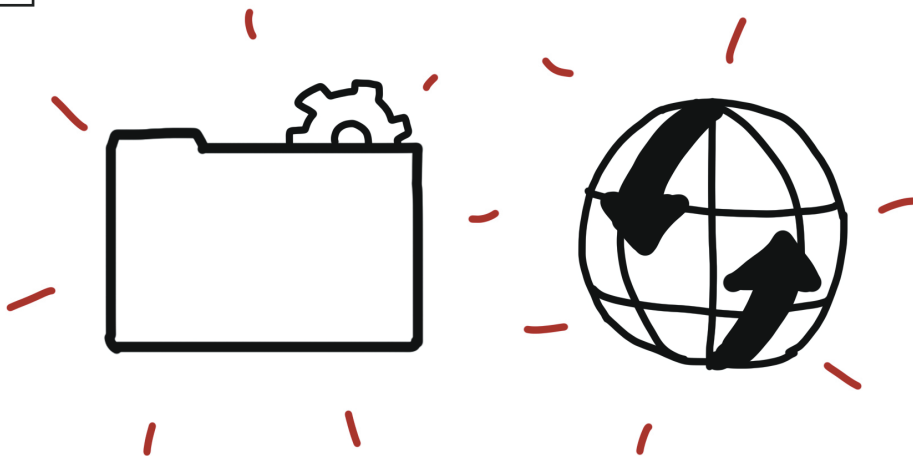
Client catches three boxes that are illustrated with different symbols.

Small stocks = Small building.

Value stocks = Hand holding a small plant.

High profit = Tree with fruits.

2b



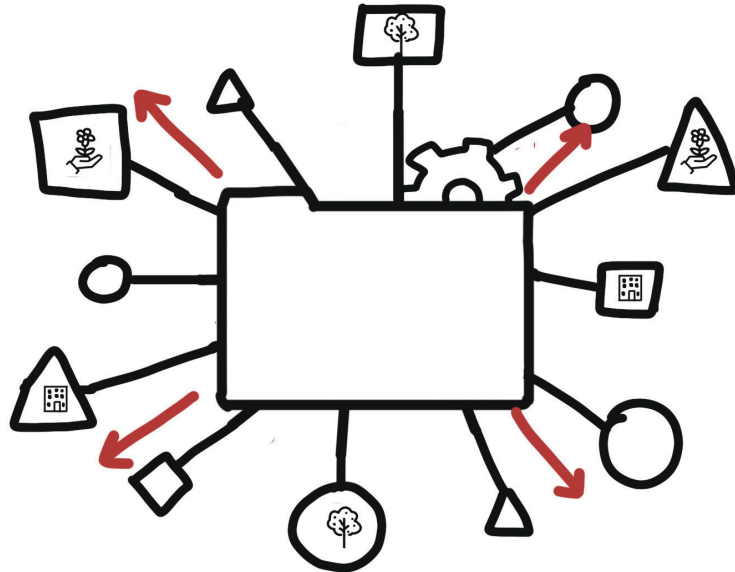
**Script**

Implementing that strategy involves two important aspects – portfolio management and trading.

Scene description

We can see two icons, representing the “portfolio management” (folder and cog) and the “trading” (globe with arrows) aspect of the IA strategy.

3a



**Script**

A portfolio manager's main focus is to achieve consistent, broadly diversified exposure to the dimensions of higher expected returns while balancing any risks, costs, and other tradeoffs that arise.

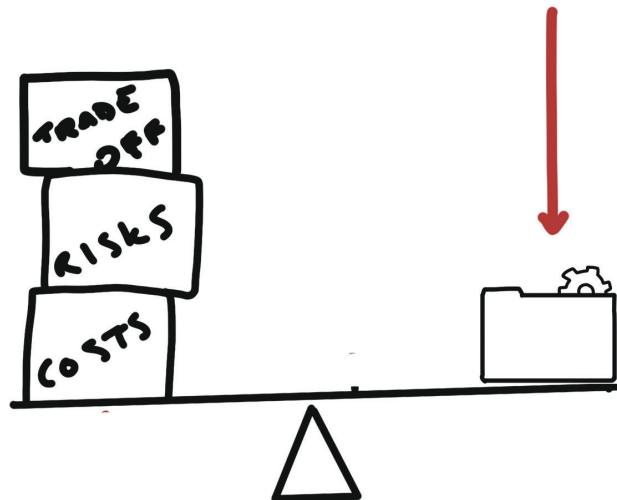
Scene description

The trading icon disappears, leaving the folder and cog (portfolio).

Shapes "grow" out of the folder when the VO mentions "diversified". Inside of some of the shapes, we can see our established icons for small caps, value stocks and companies with high profitability (small business building, fully grown flower in hand, fruit tree).

The shapes immediately retract back into the folder.

3b



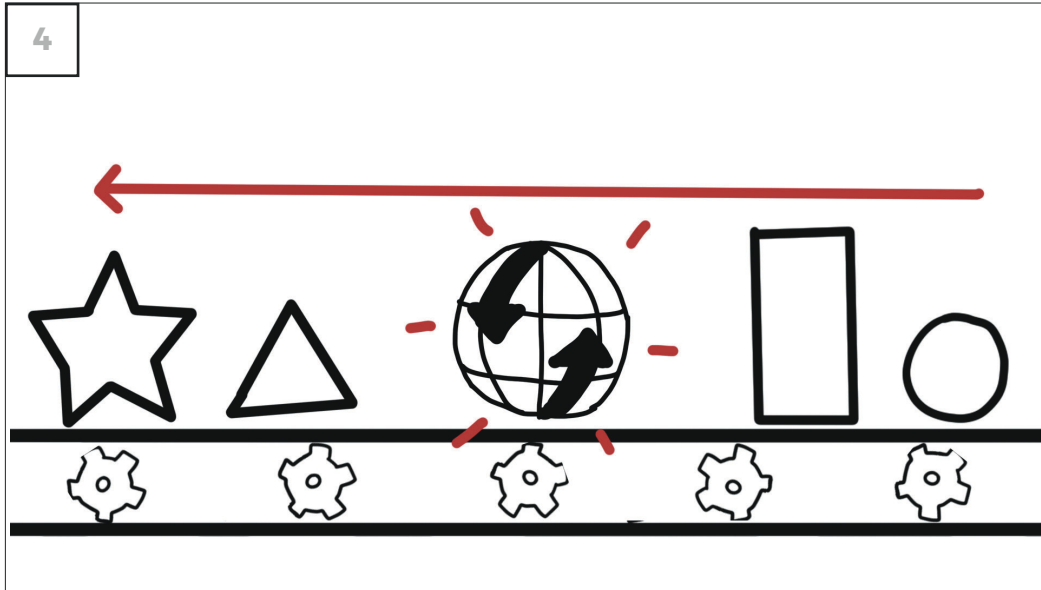
**Script**

See panel #3a

Scene description

The "portfolio" (folders) starts to fall towards the bottom of the screen, we follow the movement and can see how it lands on a seesaw, balancing it out. There are three boxes on the other side of the seesaw, labeled with:

- COSTS
- RISKS
- TRADEOFFS



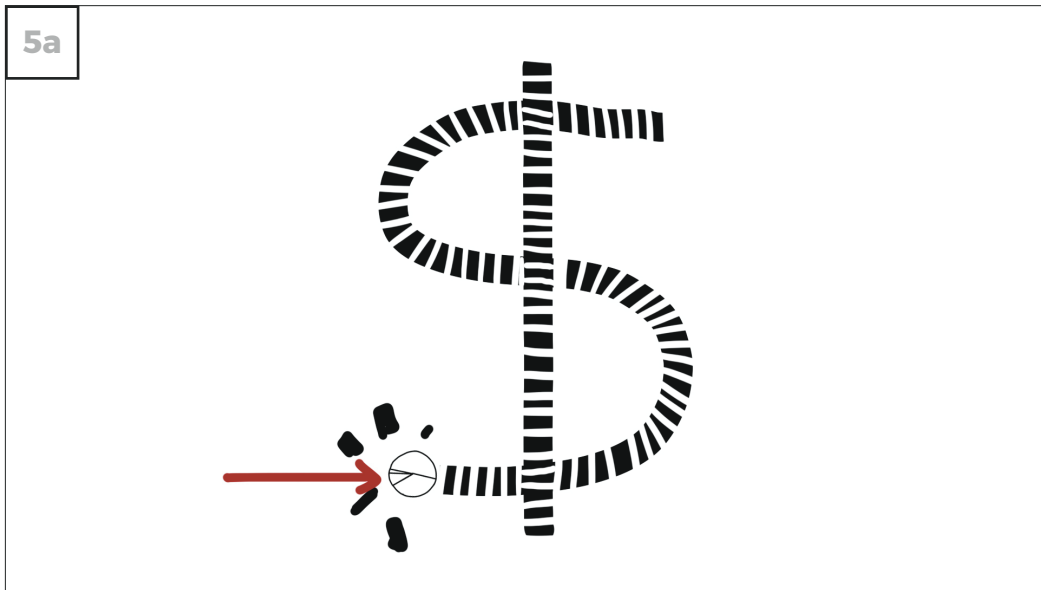
**Script**

**It's the job of the trader to execute that strategy by placing cost-effective trades.**

Scene description

We can see a conveyor belt with shapes. From time to time a trading icon (globe with arrows) appears on top of one or the other shape, accompanied by an audio signal. This represents "cost-effective trades".

Every time the trading icon vanishes, the shape that it covered is also gone.



**Script**

**There are several costs associated with trading, and they have a big impact on net returns.**

Scene description

We can see how a pie chart (the costs) rolls into dominos that have the shape of a dollar (net returns).

5b



**Script**

As well as commissions, custody fees and exchange fees, there's also bid-offer spread, which is the difference in the quoted price for buying and selling a security.

Scene description

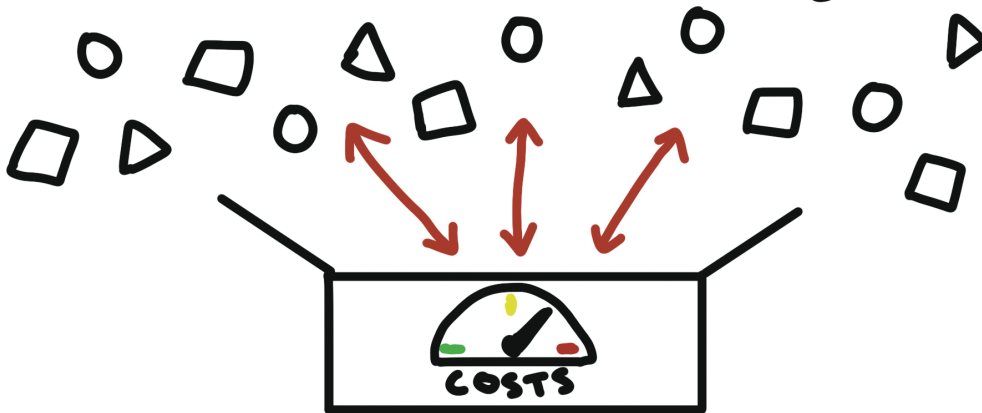
The pie chart continues to roll through the dominoes, knocking more and more over.

Everytime another cost is listed by the VO, the pie chart "grows" in bursts, causing more dominos to fall over.

The dominos stop falling when around 40% have been knocked over to show the effect costs can have to returns.

6a

Traditional Active Managers

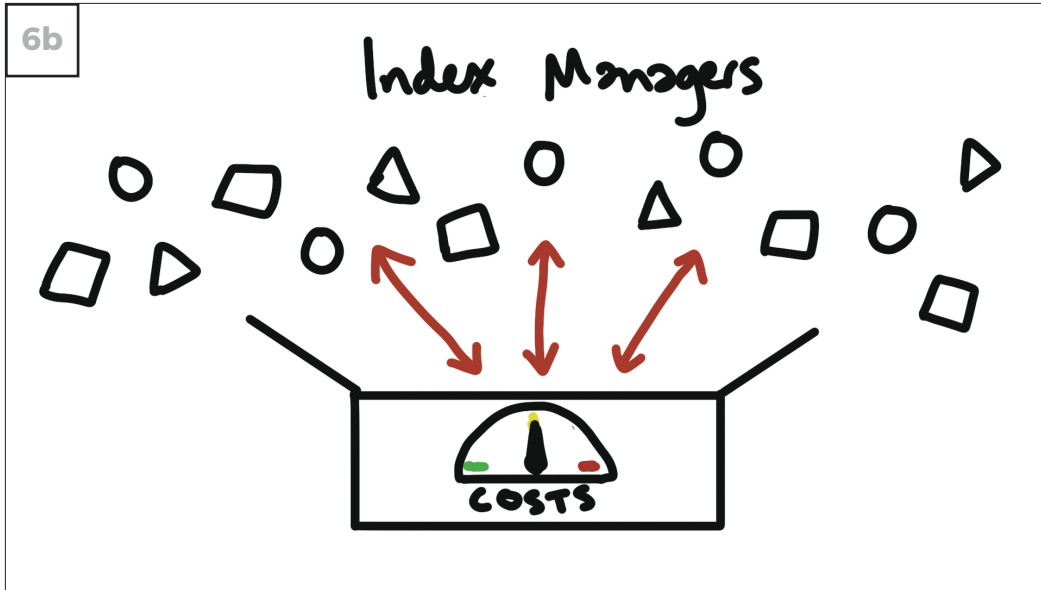


**Script**

Because traditional active managers tend to trade frequently, their costs are particularly high.

Scene description

The text "Traditional Active Managers" appears at the top of the shot. Below it, we can see shapes hovering in the air. A box with a "cost" gauge moves into shot. The indicator moves into the red, high cost area while shapes are rapidly moving in and out of the box (frequent trading).



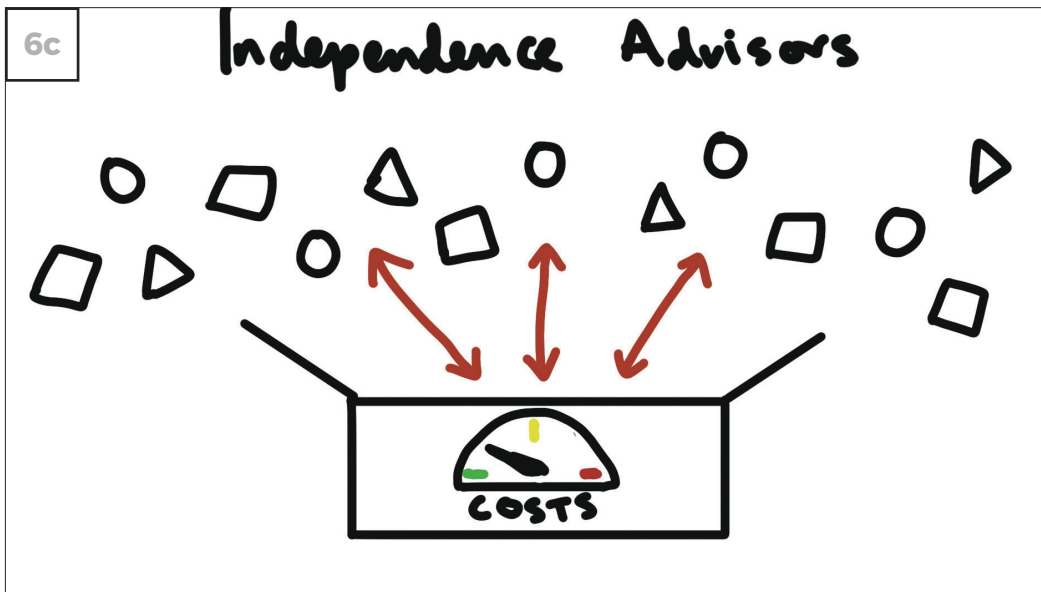
#### Script

Index managers trade far less often, but because they have to buy and sell at the same time, as stocks inevitably drop in and out of the index they're trying to replicate, they have to pay more to trade.

#### Scene description

The "active manager box" moves out of shot, instead a new box moves into view. At the same time the title changes from "traditional active managers" to "index managers"

This box also has a cost gauge and shapes are moving in and out of the box. However, by far not as frequently as in the previous scene. The gauge indicator is in the yellow area of the gauge.



#### Script

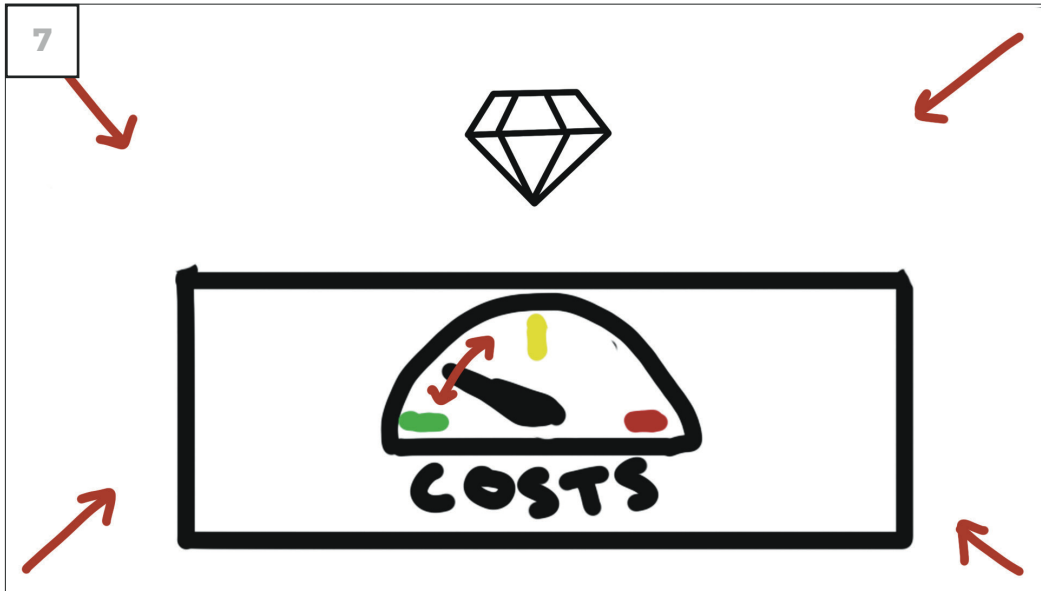
We prefer investment solutions that employ a flexible and patient approach to trading, which allows us to execute trades on more favourable terms.

#### Scene description

Again, a new box moves into shot, the title now changes to "Independence Advisors".

Shapes are moving in and out of the box, the frequency of shapes moving in and out of the box is slower than panel 6a but faster than panel 6b.

The cost dial hovers in the green area of the gauge.



**Script**

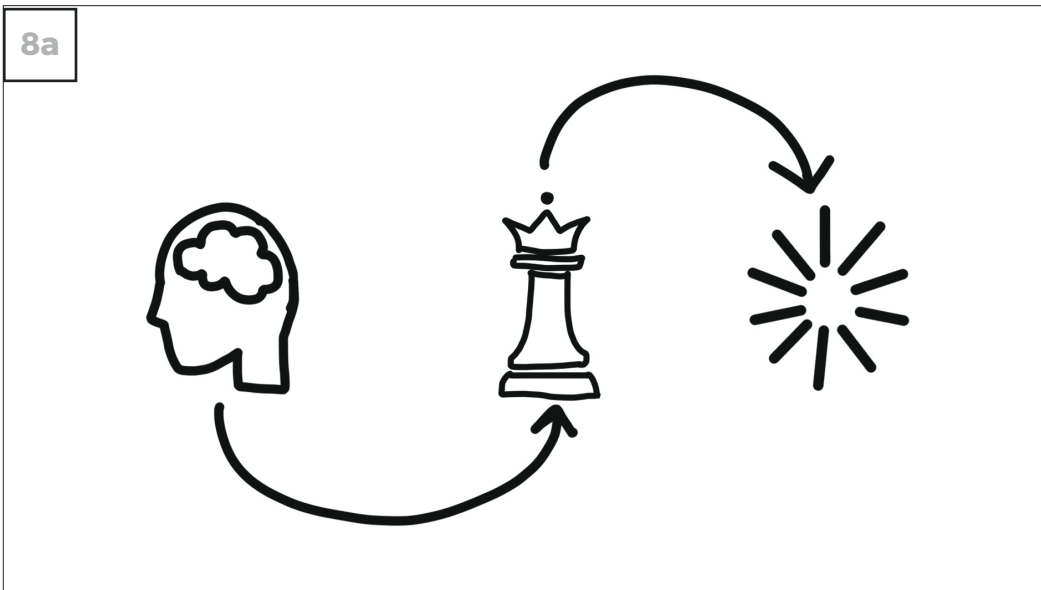
The aim is to strike the most efficient balance between expected premiums and the costs of turnover on a daily basis.

It's that combination of lower costs and higher expected returns that produces the best possible outcomes for investors.

Scene description

We zoom into the IA box. A gem appears above it, growing and shrinking at the same rate as the gauge indicator moves between the green and yellow area.

All in all the trend is an increase of size for the gem and a move towards the green area of the gauge.



**Script**

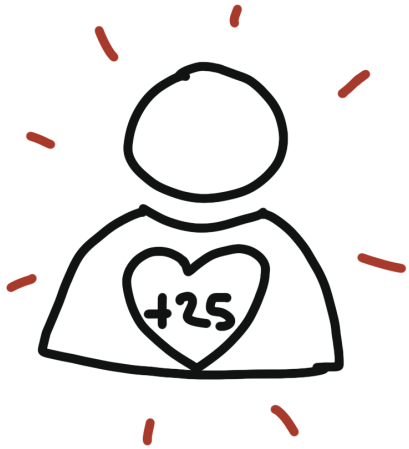
It's a philosophy, strategy and process that's kept clients of Independence Advisors ahead of the game for more than twenty-five years... and it can do the same for you.

Scene description

Icons representing philosophy, strategy and process appear and an arrow weaves through them to show the connection.



8b



**Script**  
See panel #8a

Scene description

The three icons (strategy, philosophy and process morph into a person icon with a heart on top with the text "+25" in it.

9

# Independence Advisors

T: \_\_\_\_\_

E: \_\_\_\_\_

WWW. \_\_\_\_\_ .COM

**Script**

Get in touch today to discover the benefits of evidence-based investing. Your future financial security is far too important to leave to chance.

Scene description

Independence Advisors contact details appear on screen.