



YOUR GOAL IS WITHIN REACH.  
SEE IT THROUGH.

# Manage your finances. Guard your future.

You've made the journey from the playground to the pros. Now is the time to develop a strategy for making the most of the opportunities you've earned. We aim to turn your early success into financial independence you can enjoy throughout your career, as you move into new ventures, and as you eventually transition into retirement.

## DRAW UP A GAME PLAN.

Planning ahead is essential to reaching the financial goals you've set for yourself—and to maintaining your focus through each stage of your career and beyond.

## PRESERVE YOUR WEALTH.

Take steps now to preserve and grow your wealth so that it can support your lifestyle and sustain you and your family for a lifetime.

## PROTECT YOUR ASSETS.

Work with our team to implement protective measures that will help position your assets against potential risks and losses.

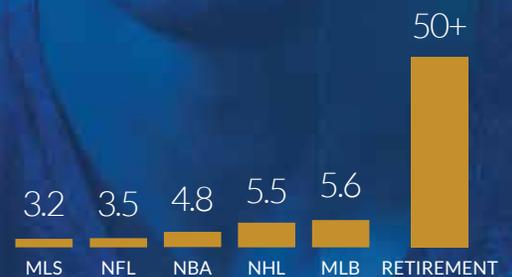
## MINIMIZE TAXES.

Let our tax professionals apply their deep understanding of tax and estate laws to help you keep more of what you earn.

## SECURE YOUR FUTURE.

Together, we'll explore preserving your wealth in ways that support you, your family, and your legacy.

## AVERAGE CAREER LENGTH IN YEARS\*



## AVERAGE CAREER EARNINGS\*

\$24.7M  
NBA PLAYER

\$17.9M  
MLB PLAYER

\$13.2M  
NHL PLAYER

\$6.7M  
NFL PLAYER

\$0.5M  
MLS PLAYER

FIRM RECOGNITION  
The Colony Group

TOP  
100

Top 100 national ranking among  
independent advisors by Barron's

## Even the greats rely on their teammates.

The combined effort of teammates is a powerful force in any sport. It's no different in the financial arena.

The members of The Colony Group team are dedicated to your success—just like you are. Count on our skill, experience, and judgment to guide you through the financial decisions you'll make as you move through your career. We understand the importance of good teammates and will work with other key advisors and family members within your inner circle.



**CRAIG S. JONES, JD, MBA, CPWA®**  
Co-President, Colony Sports  
and Entertainment

- Broad and dynamic background in finance, tax, and strategic planning
- Substantial expertise and experience managing the wealth of active and retired professional athletes, particularly in the NFL and NBA
- Strategic wealth management services and sophisticated strategies to enhance and preserve individual and family net worth
- Granted the Certified Private Wealth Advisor® designation in 2010



**IAN BARCLAY, CPA/PFS**  
Co-President, Colony Sports  
and Entertainment

- Deep experience counseling active and professional athletes
- Particular expertise in counseling current and retired athletes and executives in the areas of international tax and cross-border financial considerations
- Comprehensive wealth management and financial advisory services for high-net-worth individuals and families throughout the U.S. and the world
- Awarded the Personal Financial Specialist designation in 1994

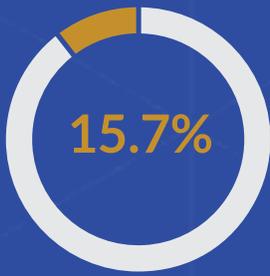


**NINA MITCHELL**  
Co-President, Colony Sports  
and Entertainment

- Extensive expertise in investment advisory, financial planning, tax, and family office services
- Advises on the complex financial lives of business owners, executives, and professional athletes
- Speaker, writer, and contributor for women's financial advocacy
- Prior executive experience at specialized sports management companies
- Series 65 license and CPA (nonpracticing)

## STATS TELL THE STORY

### PRESERVE WEALTH\*\*



Bankruptcy affects 15.7% of NFL players within 12 years of retiring.

### PROTECT ASSETS\*\*\*

# 60-80%

Divorce rate among professional athletes is 60-80% versus 50% for the U.S. public.

## OUR STATS

### TEAM MEMBERS

Colony Sports and Entertainment

# 117+

sports industry clients represented

# 50+

athletes assisted in transitioning into retirement or other careers

### CO-PRESIDENTS

Colony Sports and Entertainment

### AVERAGE

# 30+

years of industry experience

### FIRM RECOGNITION

The Colony Group

# TOP 300

Recognized nationally among top 300 registered investment advisors by the Financial Times

## Your journey from early success to lasting wealth.

You have lofty ambitions and high expectations for yourself—and the inner drive to achieve everything you've set out to do.

We can assist you in accumulating and preserving the hard-earned wealth that comes from a highly successful career. Let's get to work on a winning game plan for your financial future.

To learn more, visit [www.thecolonygroup.com/solutions/sports-professionals](http://www.thecolonygroup.com/solutions/sports-professionals).

### Disclosures Regarding The Colony Group

The Colony Group, LLC ("Colony") is an SEC-registered investment advisory firm with offices in Massachusetts, New York, Virginia, Florida, and Colorado. In Florida, Colony is registered to do business as The Colony Group of Florida, LLC. Registration does not imply that the SEC has endorsed or approved the qualifications of Colony or its respective representatives to provide the advisory services described herein. Information provided herein is general and educational in nature. It is not intended to be, and should not be construed as, investment advice. Services offered are provided pursuant to an advisory agreement with the client.

Awards and recognitions by unaffiliated rating services, companies, and/or publications should not be construed by a client or prospective client as a guarantee that he/she will experience a certain level of results if Colony is engaged, or continues to be engaged, to provide investment advisory services; nor should they be construed as a current or past endorsement of Colony or its representatives by any of its clients. Rankings published by magazines and others are generally based exclusively on information prepared and/or submitted by the recognized advisor. Please see below for a more detailed description of the criteria used with respect to the awards and recognitions granted to Colony and, as indicated below, its individual employees. The Colony Group did not pay a fee for inclusion on any list described herein.

Barron's criteria: Advisor's assets under management, contribution to the firm's revenues and profits, and quality of service. The Barron's lists included Colony's CEO for 2007 and 2009-2017, and the President of Mintz Levin Financial Advisors (MLFA) for 2007-2011, who, after MLFA merged into Colony in 2012, was included in the list for 2013-2015 while serving as Colony's vice-chair.

The Financial Times (FT) criteria: Based on data gathered from RIA firms, regulatory disclosures, and the FT's research. As identified by the FT, the listing reflected each practice's performance in six primary areas, including assets under management, asset growth, compliance record, years in existence, credentials, and accessibility. The list included Colony for 2014-2017.

\* Source: <http://ftw.usatoday.com/2013/10/average-career-earnings-nfl-nba-mlb-nhl-mls>. "Retirement" refers to years spent no longer playing sports (accessed September 2017).

\*\* Source: <http://fortune.com/2015/04/15/nfl-players-bankrupt/> (accessed September 2017).

\*\*\* Source: <http://www.benefitspro.com/2014/08/14/high-divorce-rate-plays-havoc-on-athletes-retireme?slreturn=1497281523> (accessed September 2017).



The Colony Group