



WEST COAST ASSET MANAGEMENT

Established in 2000, West Coast Asset Management (WCAM) is an investment advisor registered with the Securities & Exchange Commission. With approximately \$200 million under management, WCAM provides exclusive equity, fixed income, and alternative asset management services to more than 100 investors consisting of high net worth individuals, institutions, retirement plans and charitable foundations.

Our mission is to preserve and enhance the wealth of our clients through a disciplined and entrepreneurial approach to investing. Our unique style brings a business owner's sense of focus, opportunity and involvement to the art of investing.

WCAM co-founder Paul Orfalea started Kinko's in 1970 with a single copy shop and built an industry-leading enterprise with 1,200 branches and 25,000 employees worldwide. His business and investing experience has shaped WCAM's entrepreneurial investment philosophy, upon which we base decisions on our own hands-on research. The principals of WCAM proudly invest a significant portion of their own net worth in the same investments we select for our clients.

About Our Company

WCAM Services

SEPARATELY MANAGED EQUITY ACCOUNTS

WCAM manages a strategy of 10-15 stocks that we thoroughly understand. Our concentrated approach reduces the risk of losing capital and enables each investment to have a meaningful impact on our results.

SEPARATELY MANAGED FIXED INCOME ACCOUNTS

WCAM manages customized bond portfolios tax efficiently to fit specific client needs.

SHORT-TERM INCOME PORTFOLIOS

WCAM manages portfolios typically consisting of 80% short-term corporate bonds and 20% dividend paying preferred and common stocks. The objective of this strategy is to provide a transparent and liquid alternative to stocks and low yielding fixed income investments.

ALTERNATIVE ASSETS

WCAM manages the West Coast Opportunity Fund, LLC, which is available to accredited investors.

CUSTODY OF ASSETS

WCAM manages assets with discretion that are held at third-party custodians. We do not use soft dollars and are not compensated by commissions.

Subscribe to our Exclusive Outlook

Our *Exclusive Outlook* newsletter offers information and commentary from the principals of WCAM, sharing current events, philosophy, history and personal experiences that influence our investment strategies.

We produce this as part of our continuing efforts to improve financial literacy and independence.

Please email info@wcam.com to subscribe.



1205 COAST VILLAGE ROAD MONTECITO, CA 93108

805 653 5333 www.wcam.com