



○ PERFECTCIRCLE  
A STRATEGIC PARTNER OF THE LIBERTY COMPANY

Embracing your *journey*.



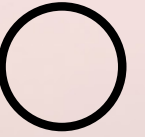


Perfect Circle,  
the doorway to a  
new world of *protection*

We are a Wealth Management Firm that designs comprehensive plans according to your life goals. We reduce risks through financial instruments, legal structures, and personal insurance.



*about us*



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## We were born to *change* the rules of the game

Perfect Circle has been transforming the way of seeing risk since 2008. We have grown to become a leading provider of insurance and financial solutions for wealthy individuals mainly living in Latin America and The Caribbean.

We are leaders in offering smart customized strategies, that protect, invest, and comprehensively manage wealth. We take care of every aspect of our client's life, minimizing significant risks through the world's most prestigious carriers.



*what we do*



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We build *perpetual*  
protection: wellness  
that adapts to your needs

A circle of protection that moves and adapts around your life and legacy, providing pristine security.



*how we do it*

## An Intelligent *Ecosystem*; tools to protect you.

Peace of mind through protection plans in 4 key pillars:

- Personal insurance.
- Investment plans (savings, retirement and education).
- Investment portfolios (through US, and Swiss Broker dealers and Custodians).
- Legal structures.





*where we are*



## The wellness *map*

Presence in 45 countries through our channel of distribution, allies, and representations.



*our business model*



## *Interconnected* horizons

Perfect Circle has become an exclusive multidisciplinary platform that allows any strategic business partner to catapult into the business of risk mitigation through state-of-the-art financial instruments, legal structures, and personal insurance.



*our partner*



*An undisputed treasure:*  
**LIBERTY**

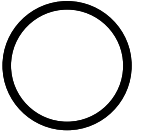
The Liberty Company is a producer-focused, family-owned, and fiercely independent insurance services firm founded in 1987. Licensed to operate in all 50 states, Liberty has grown consistently and, in recent years, exponentially.

According to leading insurance industry publication The Hales Report, The Liberty Company is the fastest growing privately held insurance brokerage in the U.S. over the past 4 years.





*strategic alliances*



# *Interconnected* wholeness

We protect your circle with the support of the best companies worldwide. We are partnered with leading global financial institutions, insurance companies, and law firms to offer our clients access to a range of state-of-the-art products and solutions.

## STRATEGIC ALLIANCES

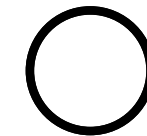


## INSURANCE





*strategic alliances*



STRUCTURES / INSTRUMENTS FOR INVESTMENT



INVESTMENT ACCOUNTS / CUSTODIANS







## Differentiation; the most *coveted* asset of all times

- **Direct representations** with the most important and recognized investment, insurance, and banking institutions in the world.
- **Exclusive representations** by country or region.
- **Safety.** All investment and insurance solutions are fully registered in the safest and most recognized financial and insurance legislations in the world (USA, UK, Switzerland, Germany, France, amongst others).
- **Compass recruiting program.** Constant search for new representations whose products and services are aimed at distinctive market niches.
- **Product Development program.** Products and specialized solutions are designed in conjunction with the companies represented by the firm to better cater various market niches.
- **One stop shop** for the firm's key clients (distribution channel and final client).
- **In house 24/7 service** and emergency center.
- **Client concierge service program.** Immaculate service.



*purpose*



Live the luxury of being calm,  
breathe the security of living  
protected, enjoy the happiness  
of boosting your future. *Today.*





Embracing your *journey*

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