



Monday, June 3, 2024

Sapphire Fiduciary Advisors, LLC serves as OCIO under Sub-Advisory Agreement with Intera Financial Planners, LLC

Louisville, KY – June 3, 2024 – Boutique investment manager, Sapphire Fiduciary Advisors LLC proudly announces its sub-advisory relationship with Intera Financial Planners, LLC.

The collaboration between Sapphire and Intera reflects a shared commitment to fiduciary duty, intelligent investing, and personalized service. Sapphire and Intera will leverage their respective areas of expertise and work together to provide Intera's clients with exceptional advice and service.

"We are thrilled to serve Intera and its clients," said Paul Stropkay, CFA, President at Sapphire Fiduciary Advisors, LLC. "This OCIO (outsourced chief investment officer) relationship creates more time for Intera to focus on its areas of specialization – life-centered financial plans and concierge services. It also provides access to Sapphire's investment management expertise for the benefit of Intera's clients."

Under the terms of the agreement, Sapphire will provide sub-advisory investment management services, bolstering Intera's portfolio management capabilities and expanding the range of investment offerings.

"We are excited about the opportunities this partnership brings," said Liz Griffiths, CFP®, President at Intera Financial Planners, LLC. "Sapphire shares our dedication to delivering exceptional value and guidance to clients, and we look forward to the positive effect this collaboration will have on our clients' financial futures."

For more information about Sapphire Fiduciary Advisors, LLC, visit sapphirefiduciary.com or contact Sapphire at (502) 509-2568 or info@sapphirefiduciary.com.

For more information about Intera Financial Planners, LLC, call (440) 933-9225 or visit www.interafp.com.

DISCLOSURES

Past performance is no guarantee of future results. No guarantees are implied. The views in this letter are intended to assist investors in understanding the firm's present investment methodology and do not constitute investment advice. For more information including additional disclosures, please visit our website.

Advisory services are offered through Sapphire Fiduciary Advisors, LLC (Sapphire), a registered investment adviser. Investment advisor representatives of Sapphire offer advisory services through Sapphire and not through affiliation with any bank. Products and services offered by Sapphire:

are not insured by the FDIC;
are not deposits or other obligations of a bank and are not guaranteed by a bank; and,
are subject to investment risks, including possible loss of principal.