

SUNRISE ADVISORS

Registered Investment Advisors
Fee-Only Wealth Management



“A Morning at Sunrise” – 12/20/2013

I. Third Plenum

- a. 1978 – Two (2) years after the death of Mao Zedong, China began to “open up” their economy.
- b. 1993 – Established a market reform agenda, resulting in China joining the World Trade Organization (WTO) and the adoption of state-sponsored capitalism.
- c. 2013 – ??
 - i. Begin transition from economy based on GDP growth, industrial infrastructure, and exports —————> to economy that is consumer driven and less reliant on SOEs.
 - ii. Policies to liberalize exchange rates, interest rates, and foreign investment.

II. Potential Implications

- a. Banking reform – deposit insurance, competition (big v. small banks), savers earn “market” rates.
- b. Negative effects – materials, resources, machinery. Positive effects – consumer goods & services.
- c. Currency valuation and interest rates – “Foundation Investments”.

III. Sunrise Advisors – 20-year Anniversary

- a. Thank You
- b. Our firm’s ideology has remained constant:
 - i. Fiduciary, “Fee Only”
 - ii. Wall Street Journal article

Holistic Services

To better serve you, Sunrise Advisors has expanded our services to be more of a “one-stop shop”. For efficiency and the successful integration of your personal wealth and estate plan, we now offer or coordinate:

- Personal Financial Planning
- Retirement Planning
- Investment Management
- Custom Retirement Plans
- Income Tax Services
- Estate Planning (Wills, Trusts, etc.)
- Business Transition

We thank you for attending. We sincerely appreciate our relationship with the people in this room.

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