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ARIMATEA™

This DEDICATED team at Arimathea, where our approach to investment screening is firmly grounded in Christian beliefs and values. At the heart of our mission lies a commitment to integrating thoughtful guidelines rooted in Catholic moral theology. Our unwavering dedication to this principle is the cornerstone of our ability to offer our Catholic investors faith-driven portfolios that align with their spiritual values.

MANAGERS

Borja Barragán



Mr. Barragan is a Spanish national and a devoted family man, happily married to Carolina and father of seven children. As a distinguished finance professional with over 20 years of experience, he has worked with top institutions like Goldman Sachs and Bank of America Merrill Lynch. In 2018, he founded Altum Faithful Investing®, a financial advisory firm that follows the criteria of the magisterium of the Catholic Church for every one of its investment decisions.

Daniel R. Catone



Daniel Catone, founder of Arimathea, champions financial growth intertwined with the common good. Guided by Catholic social teachings, he believes investments in line with Catholic social teaching embody the Catholic faith in finance. With a master's in Catholic Theology, Catone's pro-bono contributions to the Catholic Church emphasize his conviction that impact investing is essential for responsibly stewarding God's gifts to us.

Clint Sorenson, CFA®, CMT®



Mr. Sorenson is the Co-Founder of WealthShield, LLC, and focuses on innovative strategies for enhancing and accelerating the traditional investment landscape. He has developed several proprietary quantitative strategies that combine behavioral, fundamental and technical analysis for a truly holistic market view. Mr. Sorenson is also a contributor to industry literature, providing content and insights to platforms including Forbes, Seeking Alpha, several podcasts, and has co-authored the book, Invest to Prosper. He holds a bachelor's degree from the University of North Carolina at Chapel Hill, is a past President of the Chartered Financial Analyst ("CFA") Society North Carolina, as well as a former board member of the Chartered Market Technician ("CMT") Association.

Max Rockwell



Mr. Rockwell focuses on developing Arimathea's portfolio and investment management. He also serves as the Director of Investment Consulting with WealthShield, LLC where he produces client proposals and portfolio modeling. He works closely with a number of clients and partners, providing added customer support and relationship management. Mr. Rockwell holds an MBA and a Bachelor's degree from Southern Methodist University. During his time at SMU, he was a member of the soccer team and helped manage the Nancy Chambers Underwood Graduate Endowment portfolio.

ALTUM INVESTMENT GUIDELINES

Principles of the Portfolios

Partnered with Catholic investment research company, Altum Faithful Investing®, Arimathea incorporates thoughtful guidelines that integrate Catholic moral theology, which is the foundation of the portfolio. By adhering to the Altum Investment Guidelines, the portfolios are constructed with four principles in mind: Human Dignity, Family, Human Life, and Creation.



CREATION
We seek to promote the implementation of practices that foster co-responsibility with the environment, (without falling into the trap of greenwashing), aimed at preserving Creation for future generations. We value practices and actions that promote the reduction of abusive environmental impact.



HUMAN LIFE
We seek to invest in companies or assets that promote and recognize the social virtues and social value of the family. We avoid investing in companies or assets whose actions and practices actively attack the Catholic understanding of marriage and the family.



HUMAN DIGNITY
Every human being has dignity that must be respected and protected. We help you to design portfolios that, among other things, preserve the dignity of your stakeholders, help to curb pornography, promote human freedom from addictions or respect religious freedom.



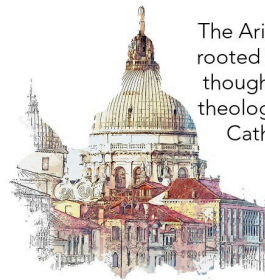
FAMILY
Build your own investment portfolios that support the culture of life, free of abortion, contraception, indiscriminate weapons, or euthanasia. We support policies and initiatives that protect human life from conception until natural death.

OUR MISSION

There is a way to pursue your financial goals while living your Catholic witness to the world. The way is with Arimathea.

Arimathea is where investing without moral compromise meets high-quality advice and investment management. No longer must Catholics choose between our faith and finances. With our diversified, purpose-built allocations, you'll own professionally managed portfolios without moral compromise.

OUR APPROACH



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Our diligent and detailed screening process that filters investments focuses on:

Analyzing not just the business activities of companies, but also their practices and policies. Special care is devoted to the companies' attitudes towards religious freedom and gender ideology.

Mitigating struggle with the morality of investments for devout Catholic investors, no conscience compromise,

Avoiding companies that have dubious or immoral practices that do not fundamentally adhere to Catholic ethical and social teachings.

Long-term asset appreciation aligning harmoniously with the wisdom of the Church

Invest with Virtue

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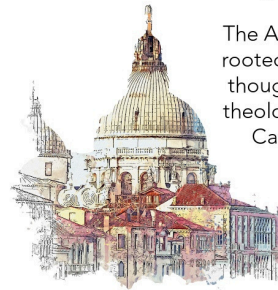
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