


Oak Capital

Think digital assets, think Evergreen Oak Capital.



Company Brochure
For Prospective
Clients



Our mission is to look after the financial best interests of our clients making sure they experience total financial freedom in their life time with minimal risk and zero stress.

Professional Fund Management

Evergreen Oak Capital offers ease of access by qualified high-net-worth individuals and institutions seeking exposure to a portfolio of digital assets managed by highly-experienced managers, traders and analysts in the crypto space. Funds offered by **Evergreen Oak Capital** provide exposure to digital assets through a single fund investment, eliminating the hassle of maintaining multiple public and private keys, wallets, exchange accounts, and often varied and complex tax documentation.

Active ETH & BTC Management

For firms that have recently completed a successful ICO and hold significant Ether (ETH) or Bitcoin (BTC) reserves or anyone with significant ETH or BTC holdings, **Evergreen Oak Capital** believes a passive hold strategy can pose undue market risk considering the extremely volatile nature of the digital currency markets. Investment of all or a portion of such currency holdings in fund strategies that in turn will trade, invest and/or lend across multiple digital asset classes, and are actively managed by **Evergreen Oak Capital** dedicated team of experienced professionals, may offer a more attractive risk alternative to those holding significant uninvested ETH or BTC

Execution Transparency

It is our mission to provide increasing levels of quality pricing, transparency and execution services so that we can provide you with the best trading experience. We are committed to execution quality and transparency. That's why we provide execution statistics to provide that transparency our clients want.

WHO WE ARE

Evergreen Oak Capital is an UK based investment company that offers wholesale execution and investment solutions for retail brokers, hedge funds and emerging market banks. Our relationships with tier 1 banks and non-bank liquidity providers, prime broker relationships, and technology vendors provide our customers with market access on an unrivalled scale.

ABOUT US

Evergreen Oak Capital provides high return financial trading services with unparalleled features for the clients utilizing recent technological innovations and responding to the ever higher investor expectations. We have put the most emphasis on safety, on balanced performance and on customer support. We provide services which approach investment from the natural demands of the clients. Through our highly efficient portfolio management you significantly reduce the high risk of losses associated with trading financial instruments and focus more on the unparalleled benefits derivable therefrom.

The basis of the investment come from the possibilities offered by the exchange markets, especially by the currency exchange market; with us, you too may profit from these possibilities and achieve returns that have only been available to institutional investors before now.

We are an asset management company. We offer innovative services that have never been available before in the field of investments and unlike the other asset managers we focus on the expectations of the clients the most. For developing our services first we have examined the needs and desires of the investors, and found that the following aspects are the most important: safety, high returns, transparent operation, liquidity, professional expertise and low costs.

From the first day our aim has not changed: we currently offer forex, cryptocurrency and futures managed accounts service to our clients which meet their expectations and desires completely. We are proud of what we have achieved until today, our success is proven by the positive responses we continuously get from our ever growing client base. As an asset management company we focus on working with strictly professional team of traders who are able to provide a good performance and stable results for our investors in the long term.

Our account management team has been specializing in exploiting the different market conditions across many years. The fluctuations of the currency market has got a direct effect on the performance of the accounts, but if the total amount invested is diversified in equal proportions, the targeted profit can be achieved in a more stable manner. We put great emphasis on providing high returns to our clients regardless of global economics. By holding an investment with us you can enjoy the benefits of the cryptocurrency, futures and forex market without economic expertise, time and efforts.

WHY US

EXPERIENCE

With over 25 years combined trading experience the Evergreen Oak Capital trading team aims to maximize profits for investors in a compliant and regulated environment.

TRANSPARENCY

Our performance results speak for themselves and can be viewed 24/7 for you to verify. Here at Evergreen Oak Capital, we charge you a monthly performance fee of 2-5% of any profits achieved meaning you keep the remaining 95-98%.

RISK MANAGEMENT

You can select the amount of capital you are willing to risk for this type of investment, and we will make sure that your capital is secured while you make profit.

EVERGREEN OAK CAPITAL PROPOSE 5 MAJOR INVESTMENTS FOR 2022

MANAGED FOREX ACCOUNT

Segregated accounts managed by pro traders in a Percentage Account Allocation Module or Individual accounts

CRYPTOCURRENCY TRADING

Bitcoins and select alt coins like XRP and ETH traded by expert crypto traders for profit appreciation.

REAL ESTATE INVESTMENTS

Investing in real estate has become increasingly popular over the last 50 years and has become a common investment vehicle.

STOCKS AND COMMODITY TRADING

The reality is that investing in the stock market carries risk, but when approached in a disciplined manner, it is one of the most efficient ways to build up one's net worth.

CANNABIS

Allocate funds to Marijuana Stocks and with the growing global cannabis sector, we introduce trading cannabis based crypto currencies that provide important benefits to the Cannabis industry.

MANAGED FOREX ACCOUNT

The Best way to get started in Forex

Managed forex accounts are a type of foreign exchange (FX) account in which a money manager trades on a client's behalf for a fee. Foreign exchange markets are commonly used by sophisticated traders, who take advantage of an ability to handle large amounts of borrowed money to amplify their gains. Forex markets have more liquidity and a faster paced trading action than the stock market offers. Because it is the most active market in the world, transaction costs are lower, making it a popular forum for those who enjoy the thrill of speculation.

The Perks of Evergreen Oak Capital Managed Account

- Rely on trading specialists and managers who have vast experience, skills and knowledge. Therefore, you will have nothing to worry about.
- With a forex managed account, you have an assurance that you will have definite returns. Getting profit is an easy thing for account managers, so we only charge a small percentage in commissions.
- Since forex accounts are liquid in nature, you can simply withdraw all of your money if you think that you do not want to proceed with a managed account.
- You do not need to have a lot of money. All you need is to secure at least \$1,000 as the initial investment.
- With an Evergreen Oak Capital account manager, you will have a consistent supply of information and updates on the forex market.

So, if you are too afraid to start your forex trading experience, why not go for an Evergreen Oak Capital managed account?

CRYPTOCURRENCY TRADING

The low-risk option you've been looking for

As you must already know, Bitcoin became the first-ever cryptocurrency when it was released in 2009.

However, with only one coin available, you couldn't trade it with any other cryptocurrency.

It wasn't until a few years later when more and more cryptocurrencies were created that people started trading them. The idea is really simple. You trade one cryptocurrency for another, with the hope that the coin you buy increases in value.

Evergreen Oak Capital engages in 2 main types of Crypto Trading:

- Short Term Trading - The main advantage of short-term cryptocurrency trading is that it offers a really good opportunity to make high percentage gains. Unlike fiat currency markets, where prices usually don't move by more than 1% each day, cryptocurrency prices can almost double overnight! Now that cryptocurrencies have become so popular, there are now more than 1,500 different cryptocurrencies to trade. This means one thing – more opportunities to make huge profits. Not only that, though, but there are large trading volumes for lots of coins.
- Long Term Trading - One of the main advantages of long-term cryptocurrency trading is that it's easy and requires a little amount of time. You don't need to understand complex trading charts or graphs as you're simply looking to hold your coin for the long term. Unlike short-term trading, where you need to constantly spend time checking the prices of cryptocurrencies, you can do it in your spare time. It's simple, once you have bought your coin, you don't need to do anything other than wait!



CANNABIS

Marijuana Stocks and Cannabis Based Cryptocurrency

Marijuana stocks are super-hot right now. That's understandable considering the growing number of countries and states that have legalized pot in some form. Some project that the annual global marijuana market could be worth \$150 billion or more within the next 10 to 15 years.

Types of Cannabis companies **Evergreen Oak Capital** works with

- Marijuana growers - Companies that cultivate marijuana (typically in indoor facilities and greenhouses).
- Cannabis-focused biotech - Companies that develop prescription drugs based on ingredients found in cannabis.
- Providers of ancillary products and services - Companies that provide key products and services to the marijuana industry, including consulting, distribution, hydroponics, lighting systems, and packaging.

With a growing market cap of \$7.55m **Evergreen Oak Capital** is looking into trading of Cannabis Based Cryptocurrency as part of our asset diversification options of 2019

Top 5 Marijuana Cryptocurrencies being traded are:

- PotCoin (POT)
- CannabisCoin (CANN)
- DopeCoin (DOPE)
- HempCoin (THC)
- CannaCoin (CCN)

REAL ESTATE INVESTMENTS

Buying real estate is about more than just finding a place to call home. Although the real estate market has plenty of opportunities for making big gains, buying and owning real estate is a lot more complicated than investing in stocks and bonds.



STOCK AND COMMODITIES TRADING

While the value of one's home typically accounts for most of the net worth of the average individual, most of the affluent and very rich generally have the majority of their wealth invested in stocks. Commodities are hard assets ranging from wheat to gold to oil. Commodities trading determines the prices of all commodities. As a result, the prices of the most important items you use every day are volatile. In some cases, like gasoline, they change from day to day.

A significant amount of trading occurs in oil, gold, and agricultural products.



SOLUTIONS PROPOSED

FX Technology for Hedge Funds

Evergreen Oak Capital Forex trading technology solutions are dedicated to hedge funds and institutional clients which ultimately enhance their services and decrease the operating costs. During the development process of our products we focus on using innovative technologies, utility and reliability of our solutions.

ECN Liquidity Solutions

With **Evergreen Oak Capital** you can have direct access to ECN Liquidity from Top Tier Banks, Prime Brokers and multiple Liquidity Providers (LPs). All your trades are executed at a fair market price on over 100 instruments available in the Matching Engine with the market depth of up to 10 levels.

Cryptocurrency Solutions

Our Cryptocurrency Solutions is one of the first technology providers, which has launched a comprehensive cryptocurrency solution dedicated to FX brokers. We offer following cryptocurrency solutions: - Cryptocurrency Trading with MT4/MT5 - Cryptocurrency Liquidity - Cryptocurrency Data Feeds

HOW IT WORKS

Our team walks through the account opening and advisory agreements, instructing the investment manager to begin and setting up reporting tools for you to follow the performance. Best of all, there are no add-on fees or additional cost to you.

EASY REGISTRATION

Easy registration
Get started by registering here on our website with few easy clicks for a managed futures, forex and cryptocurrency account.

TAILORED PORTFOLIO

Our pro team and online tools helps you identify talent in commodity, managed futures, managed forex, cryptocurrency and global macro alternative investments.

24/7 SUPPORT

Easy, 24/7 hours support, call or chat with a Client Services Representative. No robots.

INVESTMENTS WITH ABSOLUTE VALUE FOR MONEY

Evergreen Oak Capital offers 8% - 14% return for fund management across all sectors in the following packages

Professional

Minimum Capital

\$1,000

8% ROI

Monthly

10% Referral bonus

24/7 support

Premium

Minimum Capital

\$100,000

14% ROI

Monthly

10% Referral bonus

24/7 support

RISK MANAGEMENT APPROACH

Evergreen Oak Capital Fund applies appropriate risk management practices ensuring that the Fund's core processes and systems are effectively controlled, fit for purpose and that risk is managed effectively.

In particular, the Board of a Evergreen Oak Capital Fund will be aware of, quantify (where possible) and monitor the risks associated with investing in and holding Forex and Crypto Assets. Our risk management framework will assess each specific risk facing the Forex and Crypto Fund and implement appropriate controls in order to monitor, manage and mitigate these risks, ensuring that these controls are designed and operating as expected.

Where any deficiencies are identified, these should be logged, reported to the Board and remediated on a timely basis.



OUR TEAM

Meet the team that's making it happen



Tessa Harvey
Founder

Tessa Harvey is the Founder, Experienced Senior Portfolio Manager with a demonstrated history of trading in the finance industry and primarily focuses on investment opportunities in the US Fixed Income markets, Skilled in Portfolio Management, Management, Investments, began working in the investment industry in 2010, Tessa is the Director of Investments for [Evergreen Oak Capital](#)



Nonie Myerson
Executive Vice President

Nonie Myerson is the Executive Vice President of Portfolio/Asset Management and a member of the Investment Policy Committee (IPC). In those roles, she oversees the firm's Portfolio Management Department, which includes the Research, Investment Operations, Investment Solutions and Portfolio Evaluation Groups.



John S. Schnabel
Managing Director

John S. Schnabel, Managing Partner, Co-Portfolio Manager, joined [Evergreen Oak Capital](#) at its inception. Mr. Schnabel was previously a Partner at Canterbury Capital Partners LLC. Prior affiliations include Generation Partners and General Motors Investment Management Corporation.



Ziva Cornwell
Chief Financial Officer

Ziva has over 20 years of experience in business and finance. Before joining [Evergreen Oak Capital](#), Ziva served as the COO and CFO for all consumer products at PayPal leading strategy, product management, business operations, strategic partnerships, finance and analytics.



Elizabeth Inger Marketing Manager

Elizabeth Inger, Marketing Manager, joined Oak in March 2020. Prior to joining [Evergreen Oak Capital](#) she served as an Executive Assistant at Benefit Street Partners LLC, a credit-focused alternative asset management firm.



Dario Salvatore Chief Operating Officer

Dario oversees Human Capital, Corporate Communications, Finance, Innovation, Information Security, Data Protection, Enterprise Risk Management and Global Custody. He is also a member of the Technology Transformation Committee.



Kristoffer Bjorge Senior Technical Lead

Kristoffer Bjorge is the Senior technical lead at [Evergreen Oak Capital](#). He is an Insightful information Technology Manager with 5 years of IT Leadership experience including oversight of infrastructure, application support and security services. Dedicated to customer satisfaction with focused delivery of technical solutions. Proven leader in directing operations, maintenance and support of complex systems.



Deven Gallagher Private Client Services

Deven Gallagher is the Executive Vice President of the Japanese Private Client Services Group. In that role, Deven is responsible for all service and support functions on behalf of Japanese private clients. Deven joined [Evergreen Oak Capital](#) in 2016 and has held a variety of roles at the firm.



Donna Hurley Business analyst.

Donna R. Hurley, joined Oakcapital in May 2019. Prior to **Evergreen Oak Capital**, Hurley was an investment specialist at Allianz Global where she was responsible for developing investment strategies for the taxable core and asset-liability portfolios, Contract Negotiation and Asset.



Gareth Ruse Network Marketing Consultant

Gareth H. Ruse, joined Oak capital in June 2016. He has 8 years' experience in information management (IM) and quantitative skills—including working knowledge of IT infrastructure, various technologies/platforms, aligned vendor solutions and the capabilities they bring—as well as experience leading major IM programs in key business areas.



Nathalie Harris Chief Data Scientist.

Nathalie Harris, an experienced Data Scientist with over 15 years of successful management and leadership experience. Of which 6 of those years has been dedicated to **Evergreen Oak Capital** in implementing solutions and improving driving performance through development and motivation of people as well as profits wherever possible backed by thorough analysis and research tempered with strategic marketing initiatives and practicality.

PRIVACY POLICY

We at **Evergreen Oak Capital** are committed to maintaining the confidentiality, integrity and security of any personal information about our users.

Information we collect from you:

We will collect and process the following data about you:

Information you give us. This is information about you that you give us by filling in forms on our site Evergreen Oak Capital or otherwise in writing with us, or by corresponding with us by phone, e-mail. It includes information you provide when you register with us and information you provide to our third party partners, agents, representatives or nominees and when you report a problem with our site. The information you give us may include your name, address, e-mail address and phone number, financial and credit card information, personal description, photography and any other relevant information.

Information we collect about you. With regard to each of your visits to our site we will automatically collect the following information:

Transactional information. We collect information about any transfer and transaction you may complete on our site, including the amount of funds or tokens associated with a trade, the types of trades executed any relevant information relating to such trades

Technical information, including the Internet protocol (IP) address used to connect your computer to the Internet, your login information, browser type and version, time zone setting, browser plug-in types and versions, operating system and platform;

Information about your visit, including the full Uniform Resource Locators (URL), clickstream to, through and from our site (including date and time), products you viewed or searched for, page response times, download errors, length of visits to certain pages, page interaction information (such as scrolling, clicks, and mouse-overs), methods used to browse away from the page, and any phone number used to call our customer service number.

Information we receive from other sources. This is information we receive about you if you use any of the other websites we operate or the other services we provide. In this case we will have informed you when we collected that data if we intend to share those data internally and combine it with data collected on this site. We will also have told you for what purpose we will share and combine your data. We are working closely with third parties (including, for example, business partners, sub-contractors in technical, payment and delivery services, advertising networks, analytics providers, search information providers). We will notify you when we receive information about you from them and the purposes for which we intend to use that information.

IMPORTANT DISCLOSURE:

Investing involves risk, including loss of principal. Past performance does not guarantee or indicate future results. Please consider, among other important factors, your investment objectives, risk tolerance and Oak Capital investment plans before investing. Diversification and asset allocation do not guarantee a profit, nor do they eliminate the risk of loss of principal. It is not possible to invest directly in an index.

Any hypothetical performance shown is for illustrative purposes only. Such results do not represent actual results and do not take into consideration economic or market factors which can impact performance. Actual clients may achieve investment results materially different from the results portrayed.

Round-Up investments are transferred from your linked funding source (Crypto wallet) to your Oak capital corps account, where the funds are invested into a portfolio of selected Plan(s) or ETFs. Only purchases made with a funding source linked to your Oak capital corps account with the feature active are eligible for Round Up investments.

Evergreen Oak Capital does not charge transactional fees, commissions or maintenance fees based on assets for accounts under \$1 million.

Investors should consider the investment objectives, risks, charges and expenses of the funds carefully before investing.

This and other information are contained in the Fund's prospectus. Please read the prospectus carefully before you invest.



Contact Us Today



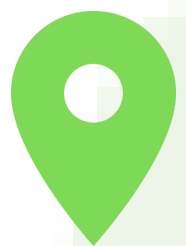
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