



NEXT
LEVEL CAPITAL

Who We Are

Nexxt Level Capital provides a comprehensive array of services including;

- ★ Tax Minimization Strategy
- ★ Bespoke Asset Management
- ★ Comprehensive Risk Management
- ★ Strategic Asset Protection
- ★ Business & Family Succession Planning

We partner with highly successful entrepreneurs to provide forward-thinking, holistic wealth creation and protection



Simple All-Inclusive Fee + Comprehensive Planning

Today, families with significant wealth are discovering the value of an integrated financial strategy for managing all of their financial affairs. Our all-inclusive structure provides the objectivity, transparency, guidance, and expertise required to protect and preserve wealth.

Investment Management

Each client receives customized portfolio management & trading. We integrate the portfolio management with tax planning to maximize a client's NET after-tax returns in a risk-aware manner. Our goal is to ensure that all client objectives are achieved as efficiently as possible.

Comprehensive Multidisciplinary Planning

At NLC we use a team approach to fully comprehend a client's current assets, liabilities, risk, and legal entities. Once we fully understand all the facts, our team of legal, tax and investment professionals will work with the client to develop & implement a comprehensive plan.



The single greatest impediment to wealth creation & preservation is and always will be taxes!

Tax Planning

Our team of professionals will work with you to ensure you have the proper entity structures, trusts, and asset location, to minimize your Federal, State & Local tax burdens for both current income and future estate taxes.

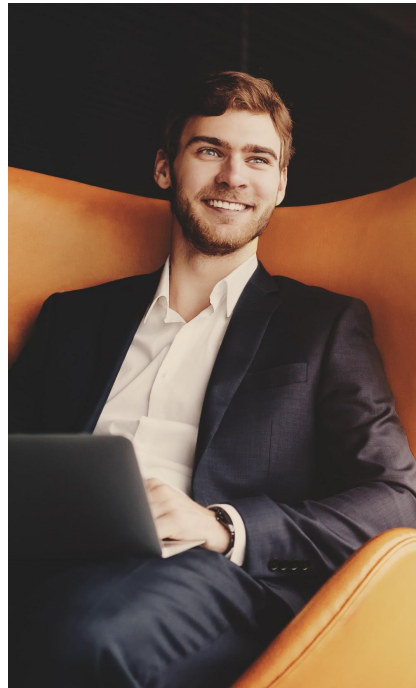
Legal Services

As an entrepreneur grows, they inevitably find themselves dealing with the legal complexities of business transactions, insurance matters, mergers & acquisitions, succession planning, real estate, family matters, and trusts. At NLC our team of attorneys take the lead in these matters to ensure we help each client manage risk and achieve optimal outcomes as challenges arise.



IDEAL FIT

At NEXXT LEVEL CAPITAL our ideal clients are successful entrepreneurs that are still experiencing significant wealth creation. Many of our clients are at a point that they have achieved success, but are looking to refine their approach to allow them to get to the...
NEXXT LEVEL





Our Process



01

Client Orientation

Our first goal is to get our team of professionals intimately familiar with the client's assets, business and family situation.

Team Collaboration

After meeting with a new client, our team of tax attorney's and asset managers will deliberate on the optimal strategy for each client.



02



03

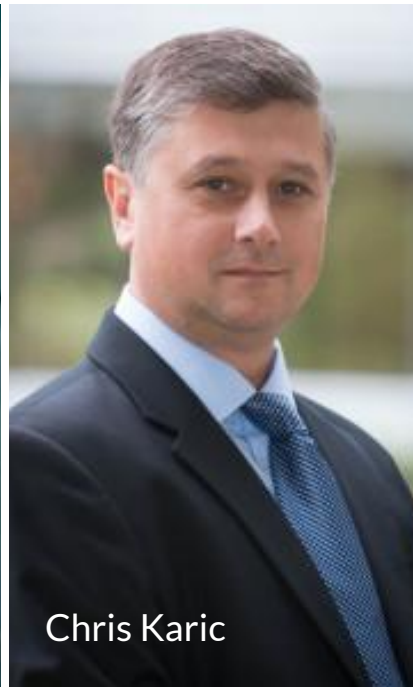
Educate, Execute, Inspect

- NLC will educate each client on the optimal strategy.
- NLC will execute the plan in an efficient manner.
- NLC will help the client inspect the results.



Team

With over 75 years of collective experience in their respective fields, our partners bring diverse and comprehensive expertise to each client relationship.





Christian Lucia

Christian is a founding member of Nexxt Level Capital. Over the past two decades, Christian has successfully managed multiple successful legal practices. For nearly the past 10 years, Christian has been the principal shareholder of Sellar Hazard & Lucia, LLC. SHL is a law firm with offices throughout the state of California and has been in business for over 60 years. SHL serves as both the transactional and litigation legal arm of Nexxt Level Capital. Christian serves as the Managing Partner of SHL and maintains the seamless integration between the multi family office of Nexxt Level Capital and the massive legal talent and strength brought to it by SHL. As a skilled transactional and litigation attorney with over 20 years of experience in the industry, Christian is uniquely positioned to serve all of the sophisticated and delicate legal needs of Nexxt Level Capital's members. Christian also brings a unique perspective to Nexxt Level Capital's investment and wealth creation talent pool. His aggressive and focused investment strategies have proven extremely successful throughout his career.

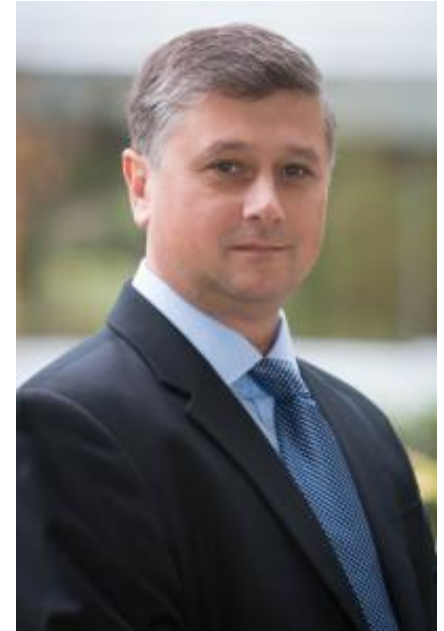
"My goal is to bring together the most talented, driven, forward-thinking and successful individuals to form an exclusive and elite group of like-minded individuals to share not only in the massive wealth creation which we can collaboratively bring, but also in the camaraderie that only this group of members can offer each other. I truly want to take all of us to the Nexxt Level!"



Christopher Karic

Christopher is a founding member of Nexxt Level Capital. Over the past twenty-five years, Christopher has successfully represented clients in the areas of estate planning, business law and real estate. Christopher has provided general counsel services to numerous companies based in California, including early stage start up companies. Mr. Karic has represented and currently represents a wide variety of clients in commercial transactions and litigation. He has negotiated and prepared numerous sale agreements, credit agreements and leases from the perspective of the seller, the buyer, the borrower, the lessor and the lessee. Christopher has been involved in numerous start up ventures representing both the company as well as investors in all aspects of early stage ventures. Mr. Karic has been recognized as a leading attorney in the State of California when Lexis/Nexis named him a Super Lawyer (2015 and 2020), an award that less than 5% of the attorneys in the State garner. SHL serves as both the transactional and litigation legal arm of Nexxt Level Capital. Christopher is a partner and chief financial officer for Sellar Hazard & Lucia. In this capacity Christopher maintains the seamless integration between the multi family office of Nexxt Level Capital and the legal talent and strength brought to it by SHL. As a skilled transactional and litigation attorney with over 25 years of experience in the industry, Christopher is uniquely positioned to serve all of the sophisticated legal needs of Nexxt Level Capital's members. Christopher possesses an L.L.M from Golden Gate University in Tax.

Super Lawyers, an affiliate of Thomson Reuters, named Sellar Hazard & Lucia partner Christopher K. Karic to its annual Northern California Super Lawyers 2020 and 2015 list. Super Lawyers recognizes attorneys who have distinguished themselves for their high degree of peer recognition and professional achievement in their legal practices. Each year, no more than 5% of lawyers are honored as Super Lawyers. Annual selection is made through a statewide survey of lawyers, independent research evaluation of candidates and peer reviews within each practice area.





Steve Austin

Steve has been working in the financial services industry for almost 20 years. Over the last 6+ years Steve has been a licensed fiduciary with several SEC registered investment advisors.

Currently Steve is the Director of Insurance Services for Benchmark Investments and holds a leadership position with Benchmark Advisory Services an SEC registered investment advisor.

Steve leads the NLC investment management and risk management efforts. As a Fiduciary, Steve focuses on how to integrate the various aspects of a client's overall strategy into the day-to-day cash management needs of our client's and their respective families.



Simple All-Inclusive Fee + Comprehensive Planning



Fee Schedule

Tier 1	Up to \$5M	1.5% of Assets under management
Tier 2	\$5M - 10M	1.25% of Assets under management
Tier 3	\$10M - \$15M	1% of Assets under management
Tier 4	\$15M+	.75% of Assets under management

Included Services

- Bespoke asset management
- Estate planning
- Tactical tax reduction strategies
- Entity formations
- Entity documents
- Risk management
- Real estate acquisitions
- Domestic asset protection
- Life insurance management
- Charitable planning
- Trust management
- Employee benefits consulting
- Corporate cash flow management
- Merger & Acquisition support
- Offshore asset protection

A scenic landscape photograph of Half Dome mountain in Yosemite National Park. The mountain's iconic granite face is the central focus, partially covered in snow and surrounded by dense evergreen forests. The view is framed by tall, dark evergreen trees in the foreground. A winding asphalt road with yellow lines curves through the lower part of the image. The sky is blue with light clouds.

Thank you.