A PUBLICATION OF THE ATLAS RESEARCH INSTITUTE™

Atlas Advisor Review™

A Professional Perspective on Physical Precious Metals

Supporting Financial Advisors through education, coordination & transparent execution.

PREPARED BY ATLAS GOLD GROUP

VOL. I · 2026

INSIDE THIS REVIEW

INTENDED AUDIENCE

- Financial Advisors
- Registered Investment Advisors (RIAs)
- Certified Public Accountants
- Estate Planning Attorneys
- Retirement Professionals
- Family Office Professionals
- Institutional Consultants

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SECTION I

The Advisor **Comes First**

Respecting the relationship before discussing the asset.

There is no substitute for **trusted advice.**

Every meaningful financial plan begins with a relationship built over time. Long before investment recommendations are discussed, clients place confidence in professionals who understand their goals, family circumstances, tax considerations, and long-term priorities. That trust is earned through experience, communication, and consistent stewardship.

At Atlas Gold Group, we recognize that physical precious metals represent only one component of a client's broader financial picture—not the picture itself. Our role begins with that understanding.

A DIFFERENT PHILOSOPHY

Many firms position themselves as the primary voice in every financial decision. Atlas was built differently: the best outcomes occur when experienced professionals stay engaged throughout the decision-making process.

Professional collaboration creates better decisions. Better decisions create stronger long-term client relationships.

RESPECTING PROFESSIONAL RESPONSIBILITIES

Every advisor operates within defined professional standards—fiduciary obligations, suitability, regulatory oversight, tax, retirement, and estate planning. Atlas respects those responsibilities and does not interpret another professional's recommendations or replace their expertise.

Instead, we provide educational resources, product knowledge, transaction coordination, and operational support related specifically to physical precious metals. Each professional remains responsible for the advice provided within his or her area of expertise.

WHY ATLAS EXISTS

- Custodian relationships
- Depository coordination
- Product availability
- Premium structures
- Trade execution
- Insured delivery
- Documentation
- IRA regulations

Atlas exists to provide that specialization while allowing advisors to continue serving as the client's primary financial professional.

FIGURE 1.1 · PROFESSIONAL COLLABORATION MODEL

Atlas functions as a specialized coordination partner within an existing professional advisory team.

"

The strongest client relationships are built when experienced professionals remain involved—not replaced.

THE ATLAS PERSPECTIVE

SECTION II

Where Physical Precious Metals **May Fit**

Understanding physical ownership within a diversified financial framework.

One asset class **among many.**

Physical gold and silver have historically occupied a unique position within the global financial system. Unlike stocks, bonds, or mutual funds, physical bullion is a tangible asset without corporate earnings, management teams, or contractual obligations. Rather than viewing physical precious metals as a replacement for traditional investments, many professionals evaluate them alongside other asset classes as part of broader diversification discussions.

TWO PRIMARY OWNERSHIP STRUCTURES

01

Precious Metals Retirement Accounts

Eligible retirement assets may be transferred or rolled into self-directed retirement accounts that permit IRS-approved precious metals. These accounts utilize independent custodians and approved depositories to maintain compliance with IRS requirements.

02

Direct Personal Ownership

Clients may also purchase physical precious metals directly for personal ownership. Depending upon individual objectives, metals may be delivered to the client’s residence or another approved destination through insured shipping—offering immediate possession.

INTEGRATING INTO BROADER PLANNING

Because physical precious metals affect liquidity, taxation, estate planning, retirement distributions, and long-term allocation, they are best discussed within the client’s complete financial plan. When requested, Atlas coordinates directly with financial professionals—promoting transparency and preserving continuity within the client’s broader planning strategy.

FIGURE 2.1 · THE FINANCIAL PLANNING FRAMEWORK

Physical precious metals are evaluated as one consideration within a client's complete set of objectives—never in isolation.

> "Physical precious metals are not designed to replace a financial plan—they should be evaluated within one.

THE ATLAS PERSPECTIVE

SECTION III

The Atlas Coordination **Model™**

A defined process built around transparency, communication & professional collaboration.

A coordination partner—**not a competing advisor.**

We do not seek to replace an advisor's role, reinterpret financial plans, or provide tax or legal advice. Instead, we focus exclusively on the areas where specialized operational knowledge is required—allowing advisors to remain at the center of the client relationship while Atlas manages the precious metals component with precision.

THE ATLAS COORDINATION FRAMEWORK™

01 Discovery

Understanding the client's objectives, ownership preferences, retirement considerations, and educational needs.

02 Professional Collaboration

When appropriate, Atlas coordinates directly with the client's Financial Advisor, CPA, or Attorney for consistent communication.

03 Structure

Reviewing ownership options, account eligibility, custodians, approved depositories, products, and documentation requirements.

04 Transparent Pricing Review

A clear explanation of product pricing, premiums, transaction costs, and delivery methods prior to execution.

05 Execution

Coordinating documentation, funding, order placement, insured delivery, or approved depository shipment.

06 Ongoing Relationship

Continued educational resources, market publications, and professional support beyond the initial transaction.

FIGURE 3.1 · THE ATLAS COORDINATION MODEL™

CLIENT

Financial Advisor

Atlas Discovery

Professional Coordination

IRA Custodian (if applicable)

Trade Confirmation

Insured Delivery / Depository

Ongoing Education

WHY DEFINED PROCESSES MATTER

— Clients understand each step.

— Advisors remain informed throughout.

— Documentation remains organized.

— Expectations remain clear.

— Every participant understands their role.

> “Exceptional service is rarely the result of individual effort. It is the result of disciplined coordination.
>
> THE ATLAS PERSPECTIVE

IV

SECTION IV

The Client **Experience**

Every interaction should reflect professionalism—from the first conversation through final delivery.

BEFORE ANY TRANSACTION

Our first priority is education. Questions are encouraged, and there is no expectation that decisions be made during an initial conversation. Clients should understand:

- Ownership structures
- Direct ownership
- Pricing methodology
- Delivery options
- Retirement options
- Product distinctions
- Premiums
- Depository relationships

TRANSPARENT COMMUNICATION

- No unnecessary complexity
- No hidden costs
- No exaggerated claims
- No pressure

DOCUMENTED TRADE CONFIRMATIONS

Before any transaction is finalized, Atlas provides documented confirmations detailing:

- Product descriptions
- Quantity
- Pricing & premiums
- Total transaction value
- Delivery or storage instructions

SECURE DELIVERY & STORAGE

Atlas coordinates either fully insured **direct personal delivery** to the client's designated address, or shipment to an **approved depository** through the client's selected IRA custodian—each following established procedures for security and accountability.

FIGURE 4.1 · THE ATLAS CLIENT EXPERIENCE™

A RELATIONSHIP BEYOND THE TRANSACTION

Atlas views every transaction as the beginning of a long-term relationship rather than the conclusion of a sale. Clients continue receiving access to educational publications, market research, Research Briefs™, and Market Notes™ designed to support ongoing learning. Education does not end when metals are delivered.

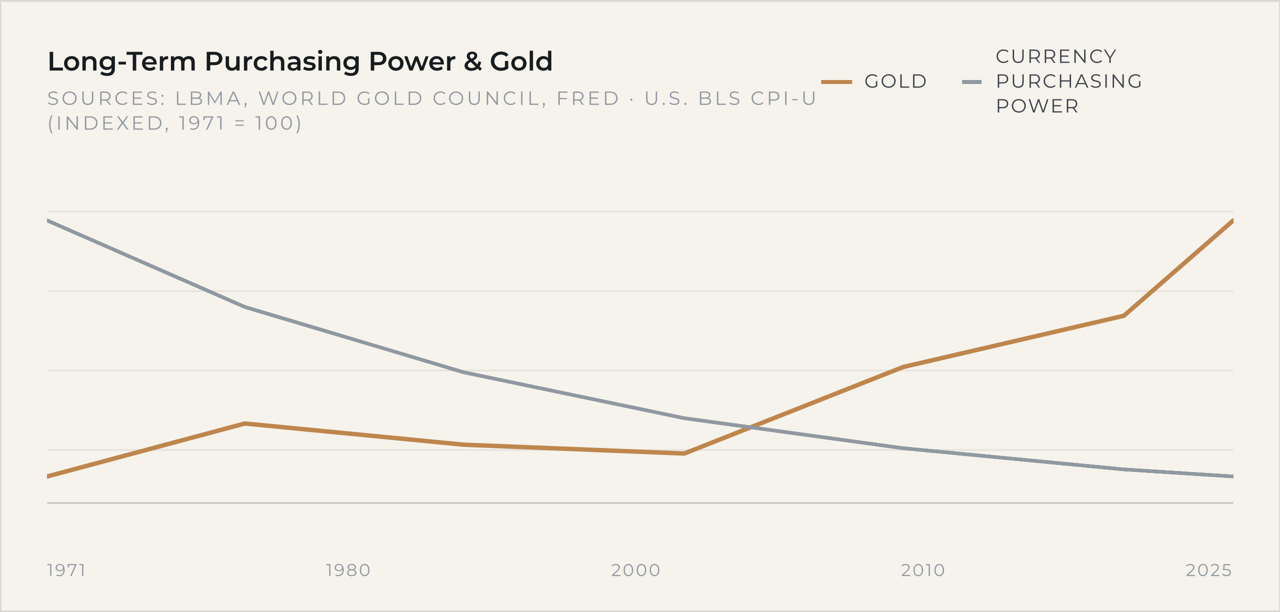
> Clients rarely remember every detail of a transaction. They always remember how the experience made them feel.

THE ATLAS PERSPECTIVE

SECTION V

Atlas Research **Institute**™

Knowledge that extends beyond the transaction—objective resources for investors and professionals.



PROFESSIONAL PUBLICATIONS

- Atlas Advisor Review™
- Atlas Research Briefs™
- Executive Reviews™
- Market Notes™
- White Papers & Educational Articles
- Atlas Roadmap Series

RESEARCH & MARKET RESOURCES

Research Briefs™
Concise studies on central bank purchases, real interest rates, and monetary policy.

Educational Hub™
A structured digital library on ownership structures, retirement accounts, and pricing.

Atlas AI™
An interactive assistant helping professionals navigate Atlas resources.

> The most valuable investment we can make is helping clients and professionals make better-informed decisions.

THE ATLAS PERSPECTIVE

CONTINUE THE CONVERSATION

Well-informed professionals **make better decisions.**

Thank you for taking the time to read the Atlas Advisor Review™. Our commitment extends beyond individual transactions—we provide educational resources, institutional research, and professional support that help you navigate discussions surrounding physical precious metals with confidence and clarity. We welcome the opportunity to become a trusted resource for you and your clients.

CONTINUE EXPLORING ATLAS

- Research Institute™
- Gold Dashboard™
- Educational Hub™
- Research Briefs™
- Market Insights™
- Atlas AI™

PROFESSIONAL COLLABORATION

Atlas works alongside advisors, RIAs, CPAs, attorneys, retirement professionals, and family offices—to complement, not replace, the trusted relationships you have built.

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PROFESSIONAL ACCREDITATIONS

BBB Business Consumer Alliance Trustlink
Dun & Bradstreet Google Business Yelp

Professional relationships are built on trust.
Trust begins with education.

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