

It's not just what you own, it's how you own it

A New Way to Think About Investing



Kirk Stafford
CEO, President



John Carter, CWS®
Senior Vice President



Val Coffey, AAMS®
Senior Wealth Manager



Nathan Stoddard
VP, Senior Wealth Manager

Growth Potential with Significantly Reduced Risk

Our strategies focus on dramatically reducing risk while maintaining significant upside growth potential.

Conservative Alternative Investments

As a Registered Investment Advisor, Desert Rose is home to a highly curated selection of innovative, conservative investments.

Client Satisfaction Guarantee

We believe that our strategies will add more value than our cost. If you don't feel that's the case, we won't charge you a fee until you're satisfied.

Tax Mitigation Partners

Our partners go beyond accounting to offer proactive tax strategies that have saved clients millions of dollars.

"We believe that the Integrated Options Portfolio may be the best advancement in the investment management world since the advent of the mutual fund."

- Kirk Stafford, CEO & President



- ✓ Strategies which significantly reduce risk and protect assets
- ✓ People-first wealth management
- ✓ 125 years of cumulative experience
- ✓ Proactive tax mitigation from expert partners that have saved clients millions of dollars
- ✓ Expert insurance advice
- ✓ We are your trusted financial partners, acting in a fiduciary capacity

13+
Years in Business

600+
Satisfied Clients

\$160,000,000+
Assets Under Management

Past performance is no guarantee of future results. Any historical returns, expected returns, or probability projections may not reflect actual future performance. All securities involve risk and may result in loss.

No investment is risk free and loss of principal is possible. Our investment strategies may involve risks that may be greater than those associated with traditional investments. You should consider the special risks including potentially speculative investment strategies, borrowing, loans, short selling, leverage and/or derivatives. There can be no assurance that any investment will meet its performance objectives or that substantial losses will be avoided. Investments in Desert Rose Capital Management's strategies and products may not be suitable for all investors. Please consult an investment professional for advice regarding your particular circumstance. You should also consult with your tax advisor regarding the specific tax implications of any strategy. Investment management services are offered through Desert Rose Capital Management, which is affiliated with Cash Value Lending Corporation and The Stafford Corporation by virtue of common control/ownership.