



Our Partnership With

Great Valley Advisor Group

Working together to provide oversight and guidance to help you succeed.

GVATM

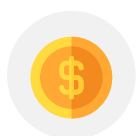
GVA provides an additional layer of oversight that helps ensure we're doing what's right.

We've partnered with Great Valley Advisor Group (GVA) to help ensure that we're providing the highest level of service possible. They're an extension of our team, and while you'll never need to speak with them directly, you may see their name in materials or hear us reference their services.



Does The GVA Partnership Cost Anything?

We invest our revenue in the GVA partnership at no additional cost to you. We do this because we believe it's in your best interest.



Does GVA Handle My Investments?

No, not unless we choose to use them. GVA does not drive investment recommendations or decisions. They do not dictate planning or investment strategies. GVA does not have a direct affiliation with any investment company, so we are free to select from multiple solutions to align with your goals. However, GVA's asset management program is a resource to us and you, on an as-needed basis. Their market research provides us with an additional layer of insight to help us make our own investment decisions.



How Does the GVA Partnership Benefit Me?

Acting as an extension of our team, GVA focuses primarily on ongoing compliance services, fueled by an extensive background in the regulatory space. In addition, the partnership provides additional oversight, resources, technology, and tools that help us better serve you.



Will GVA Contact Me Directly?

You will occasionally receive materials from GVA. You may also see them referenced in various resources, from proposals, to investment advisory and regulatory information.

Who is GVA?

GVA is a leading technology-driven, full-service Registered Investment Advisor (RIA). They partner with select independent financial advisors to provide customized technology, investment strategies, compliance, and back-office solutions. These solutions enable us to work more efficiently, stay on top of industry trends and best practices, have increased confidence in our compliance processes, and spend more time focused on you and your goals. The strength of the GVA network, and their unwavering commitment, enables us to best serve you and fulfill our fiduciary obligation.

GVA acts as an extension of our team, providing oversight, technology solutions, and other services.



GVA works with a strong network of advisors who put their clients' financial interests above their own.

"GVA has elevated us to a higher fiduciary standard. We feel confident that we're operating in the best interests of our clients because we're investing in crucial oversight."

- **GVA Advisor**

"The GVA partnership exists to make sure we meet certain standards. They evaluate what we're doing to make sure it makes the most sense. That additional oversight is invaluable and something we invest in to better serve our clients."

- **GVA Advisor**

If you have questions or would like more information about GVA or our partnership, we are here to help. GVA is an integral part of our business and a critical component of your success.

Learn more about Great Valley Advisor Group:

www.greatvalleyadvisors.com

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