Cardinal Wealth Management LLC

The Key to Unlocking Your Financial Future.

Your Trusted Financial Life Partner

A Financial Life Planning Team Working in a Fiduciary Capacity for You!

Our Story

A Great Story Starts
With a Clear Understanding
of our Purposes

Our Mission

To Simplify The Lives Of Our Clients

Guide Our Clients Through Crucial Life Transitions With Sound Advice

Help Our Clients Pursue Their Desired Return On Life

What we do

Provide Confidence:
Help Provide Financial Independence Through Sound Planning

Access to Great Talent:
Access Great Human Talent Both Internally and Externally, including the Coordination of Other Specialized Financial Professionals

Lead:
Lead Our Clients With Integrity

Navigate Complexity:
Provide simplicity around complexity through an integrated planning process

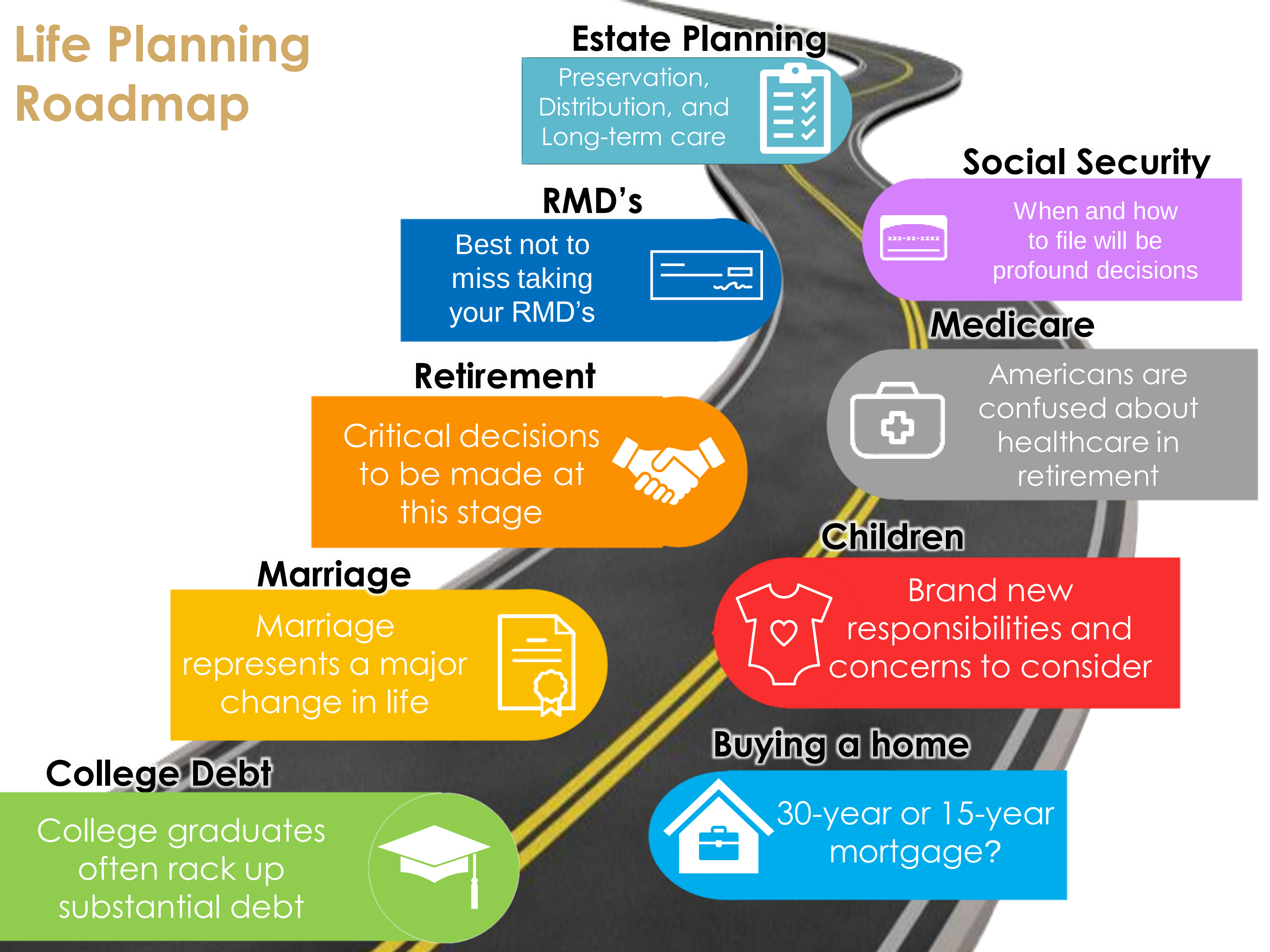
Why US?

Value…Delivery…Outcome

- Clients always come first
- Team Based Approach with Comprehensive Planning for You
- Integrated Advice coupled with Strategic Planning Tools
- Your Desired Return on Life

Wealth Management Menu of Services

- Budget & Cash Flow Planning
- College Funding
- Employee Benefits Maximization
- Insurance Planning
- Financial & Investment Planning
- Estate & Nursing Home Planning
- 401k Portfolio Analysis
- Small Business & Retirement Planning
- Social Security Planning


Life Planning Roadmap
Estate Planning
Preservation, Distribution, and Long-term care
Social Security
When and how to file will be profound decisions
RMD's
Best not to miss taking your RMD's
Medicare
Americans are confused about healthcare in retirement
Retirement
Critical decisions to be made at this stage
Children
Brand new responsibilities and concerns to consider
Marriage
Marriage represents a major change in life
Buying a home
30-year or 15-year mortgage?
College Debt
College graduates often rack up substantial debt


Our Journey Together
Prioritizing Goals and Desired Outcomes
Bring Organization to your Financial House
Provide Education and Tools to Facilitate Decision Making
Collaborate in a Transparent Manner For Plan Implementation
Proactive Financial Vision for Life Transitions
Ongoing Monitoring and Plan Progress

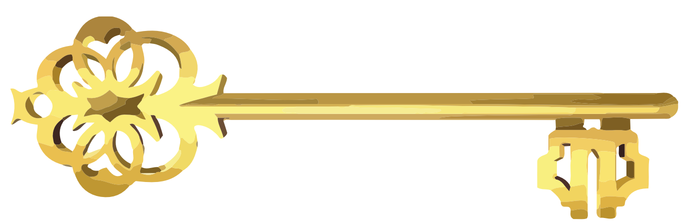
TECHNOLOGY
FLOW CHART

Our Team

- **Greg Metcalf, AIF®,CWS®, RFC®**
  Owner, Founding Partner, Registered Securities Principal
- **Sue Pevac**
  Financial Planner
- **Beth Metcalf**
  Director of Office Business Development
- **Julie Picard**
  Operations Assistant & Client Service Coordinator
- **Ger McGill**
  Part-time Administrative Assistant
- **Tedy**
  Director of First Impressions

Our Slogan

Service…Dedication…Passion…You



Not only are our Values at work for you, but also for the Community we live in

- Campbell-Dickinson St. Patrick’s Day 5k Run/Bike/ Walk
- The Jefferson County United Way
- Ohio Valley Health Center
- The Urban Mission Longest Table
- The Zach Collaros Foundation
- The Cynthia Rose Phillipson Memorial Foundation
- The BJKM Jr. High Crusader 5k Run/Walk
- The Refuge for Women 1:99 Safe House
- Big Red Boosters
- Alzheimer’s Association

Disclosures

Securities offered through Registered Representatives of Cambridge Investment Research, Inc., a broker-dealer member FINRA/SIPC. Advisory services through Cambridge Investment Research Advisors, Inc., a Registered Investment Adviser. Cambridge and Cardinal Wealth Management, LLC are not affiliated.

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626 North 4th Street, Steubenville, OH 43952
(740) 314-8342