



Welcome to Risler Financial Management

A PERSONALIZED FINANCIAL PLANNING FIRM



RISLER
FINANCIAL
MANAGEMENT



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MISSION STATEMENT

TO ***COMPETENTLY*** AND ***ETHICALLY*** GUIDE OUR CLIENTS TOWARDS THEIR FINANCIAL GOALS, ENABLING THEM TO FOCUS ON THE MORE MEANINGFUL ASPECTS OF THEIR LIVES.

VALUE STATEMENT

WE ACCOMPLISH OUR MISSION BY IMPLEMENTING TRUST:

- T** TIMELY AND EFFECTIVE COMMUNICATION
- R** RESPECTFUL UNDERSTANDING OF CLIENT OBJECTIVES
- U** UTILIZATION OF OUR PERSONALIZED, PROACTIVE “ADVICE FOR LIFE”
- S** SERVICE WHICH EXCEEDS OUR CLIENT’S EXPECTATIONS
- T** THOUGHTFUL AND CARING COMMITMENT TO EXCELLENCE

OUR VALUES ARE AT THE CORE OF ALL WE DO IN ESTABLISHING RELATIONSHIPS BASED ON ***INTEGRITY*** AND ***TRUST***.

We help you:

- Simplify your financial life and achieve your goals
- Generate the necessary income to sustain your lifestyle now and throughout retirement
- Build a legacy for the ones you love

*“Life’s short.
Live passionately.”*

Marc A. Pitman

Client Profile

Many clients seek our services in an effort to prepare for a comfortable retirement, save for a child’s education, navigate a life in transition and leave a legacy.

Our ideal client:

- Expects honesty
- Thinks about wealth from the perspective of what it can do for family, community and charitable causes
- Has a clearly articulated vision of the future for his/her personal, business and professional life
- Values, respects and appreciates professional advisors and long-term relationships
- Desires wealth management strategies, not just investment products
- Has expectations of realistic investment performance
- May be transitioning from one phase of life to another
- Considers Risler Financial Management as the primary source for financial advice

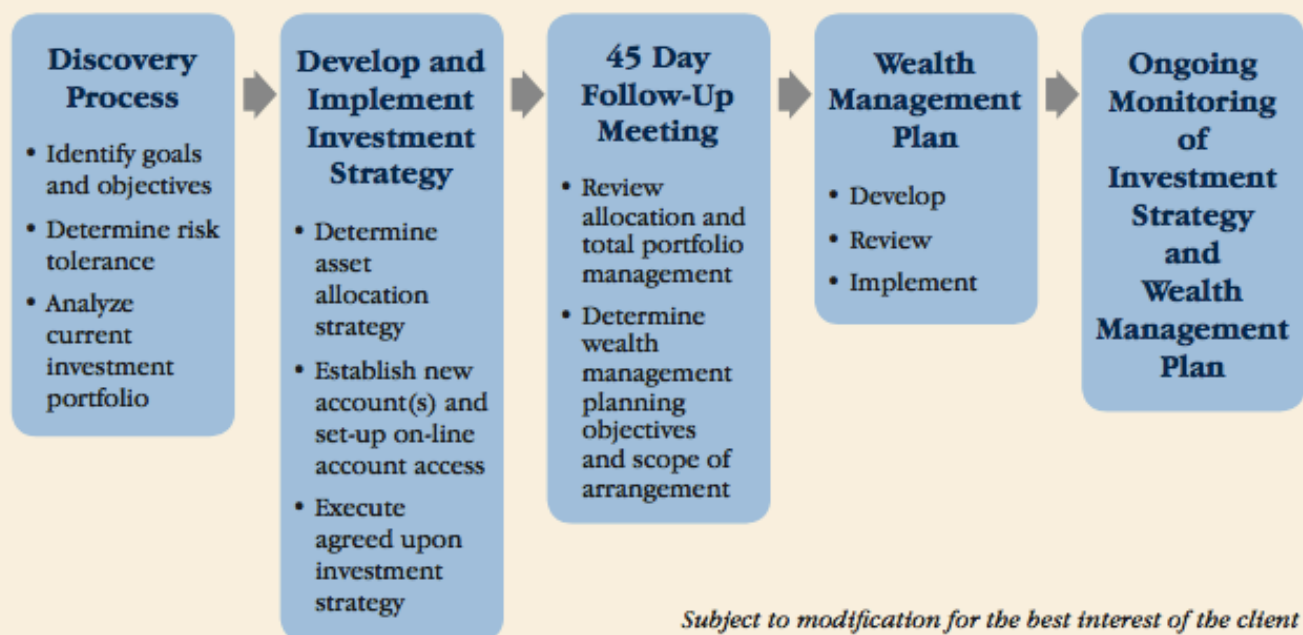


Our Approach... Collaborating With You

We are in this together. Your goals become our goals. Our approach is different from most other wealth management advisors:

- We provide independent and objective advice
- Our advisory model enables us to make changes when appropriate, allowing us to serve you with a high level of integrity and trust
 - ❑ When we make trades, there is no transaction cost to you and no compensation to us; in this way, we are better aligned with your investment interests and goals
 - ❑ When you prosper, we prosper; if you suffer, we suffer
 - ❑ Through our discretionary management, we help to instill confidence during volatile markets for a superior client experience
- We take the time to get to know **You**

The Client Experience



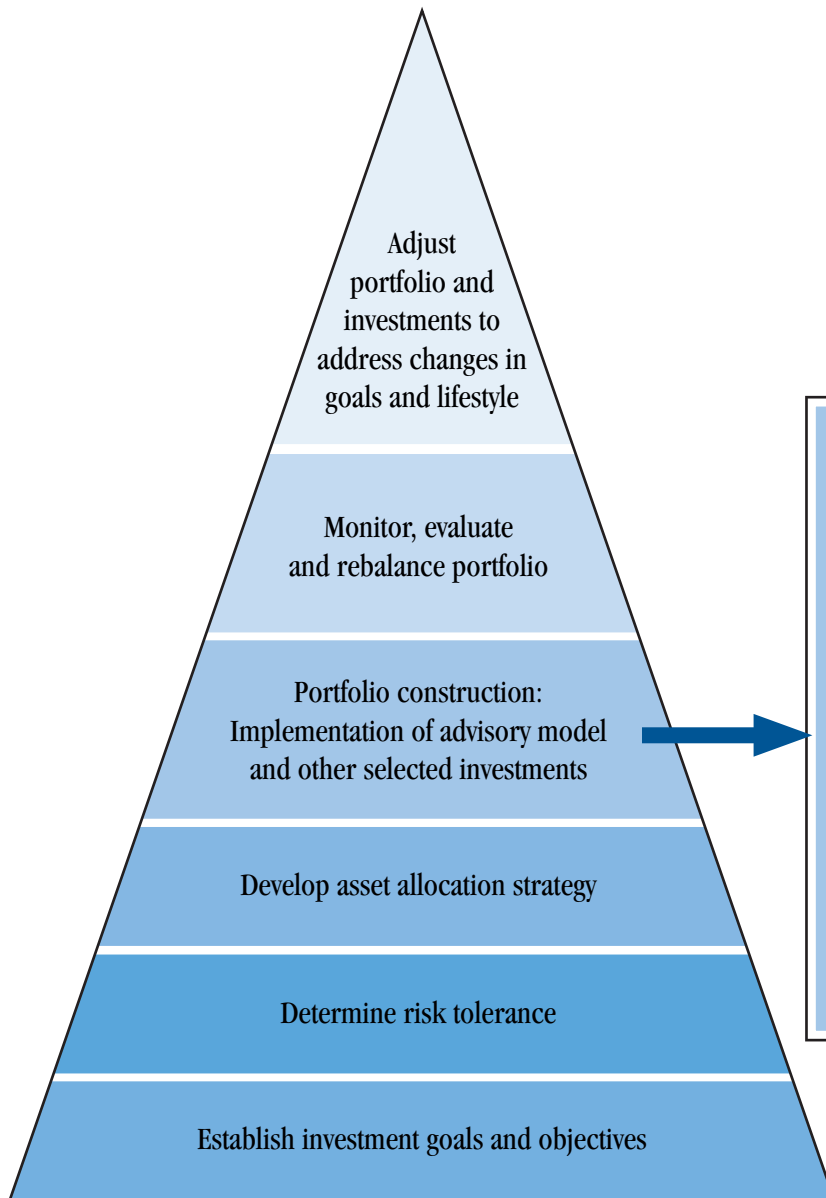
Investment Management Process - Disciplined, Consistent, Time Tested

We utilize a simplified and streamlined process that clients can easily understand and appreciate. Through consensus research from a variety of trusted industry sources, we identify opportunities and obstacles within the market in creating our Asset Allocation Model Portfolios.

*“Simplicity
is the ultimate
sophistication.”*

Leonardo Da Vinci

Investment Management Process



Total Portfolio Management

Part 1: The Centerpiece

Cost-effective and tax-efficient core investments, surrounded by other investments with a flexible mandate, proven track record and superior governance

Part 2: The Allocation Difference

Complementary non-correlated alternative investments for enhanced diversification, income potential and total return objectives, subject to qualifications and requirements

Part 3: The Security of Income

Income-oriented investments to help address fixed income expenses in retirement as a supplement to typical sources such as Social Security and Pension benefits

No process or strategy assures success or guarantees against loss.

There is no guarantee that a diversified portfolio will enhance overall returns or outperform a non-diversified portfolio. Diversification does not eliminate market risk.

Alternative Investments may not be suitable for all investors and involve special risks such as leveraging the investment, potential adverse market forces, regulatory changes and potentially illiquidity. The strategies employed in the management of alternative investments may accelerate the velocity of potential losses.

Comprehensive Wealth Management Services

Our focus is on you! What matters most to you, matters most to us. Identifying your goals and making measurable progress towards pursuing them is what keeps us so enthusiastic about the services we provide. Our planning and advisory services range from retirement, investment, estate, insurance, tax, and lifestyle management.

We have in-depth experience in financial planning and investment management and collaborate with other professionals who have the expertise necessary for a successful wealth management plan, including professionals with whom you already have a relationship.

Affiliated with LPL Financial, LLC, our advisors operate with large firm resources, while maintaining personalized attention and care for our clients.

*“In preparing for battle
I have always found that
plans are useless, but planning
is indispensable.”*

General Dwight D. Eisenhower

Risler Financial Management



“Stop counting your ‘years’ and start enjoying your ‘seasons’.”

John Paul Warren

Meet Bruce Risler...

“I provide the leadership to coordinate and simplify your financial life.”



RISLER
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Securities offered through LPL Financial, Member FINRA/SIPC.

Investment advice offered through Private Advisor Group, a registered investment advisor.

Private Advisor Group and Risler Financial Management are separate entities from LPL Financial.