



EXCITING NEWS FROM AMERIWAY!

Ameriway Financial Services, Inc. (AFS) is pleased to announce it has entered into a Partnership Agreement with Flynn Wealth Management (FWM), of Moorestown, New Jersey. This collaboration, years in the making, brings together two experienced and well-positioned wealth management firms dedicated to serving their clients' financial needs in a fiduciary capacity. "The combined resources of AFS and FWM will allow us greater efficiencies and scale to better serve our existing clientele, and grow our firm to become a preeminent wealth management company serving clients in twenty-two states," according to Gregory Merlino, President of AFS. "The complexities surrounding portfolio management, tax planning, retirement and estate planning strategies have become much more acute, and having the combined expertise of AFS and FWM will enable us to offer our clients a broader array of financial planning services in a cost-effective manner."

In conjunction with this new partnership, AFS and FWM will do business as "Vallum Wealth Management." Vallum is of Latin origin, meaning "a defensive wall or moat," and was chosen to exemplify the obligation we undertake to seek protection of our clients' wealth and legacy. The target date for partnership completion is first quarter of 2018, and we anticipate a seamless transition for our respective clientele. We look forward to sharing our vision and partnering with you as we embark on the future of truly personalized wealth management.

To learn more about the AFS and FWM partnership, please see the attached FAQs.

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Securities offered through LPL Financial, Member FINRA/SIPC. Financial Planning offered through Ameriway Financial Services, Inc., a Registered Investment Advisor and a separate entity from LPL Financial.

FREQUENTLY ASKED QUESTIONS

- **What does this Partnership mean for me?** Everything regarding your relationship with the Principal and staff of AFS will remain intact. The added expertise and resources of FWM, however, will enable us to serve your planning needs to a greater extent. The proliferation of investment alternatives, anticipated overhaul of tax reform, implementation of the Department of Labor (DOL) Fiduciary Rule, and overall challenges of adequate retirement income mandate a more personalized and comprehensive approach to your family's financial needs. This partnership will allow us the opportunity to address those needs more efficiently given the expanded knowledge and experience of Vallum's senior management.
- **Why the name change to "Vallum Wealth Management?"** The synergies between AFS and FWM are such that our expanded capabilities deserved a new identity. I have known and collaborated with Ryan Flynn, CFP[®], ChFC[®], President of Flynn Wealth Management, for several years. As an advisor with LPL Financial, he attended many of the same conferences as I have, and we meet regularly to discuss industry and practice management issues. His integrity, knowledge, and dedication to client service are a "hand in glove" fit with Ameriway's core values.

The word "Vallum," of Latin derivation meaning defensive wall or moat, along with our logo of a shield, represents our combined philosophy that wealth preservation, and protecting your family's financial legacy, is the cornerstone of our existence.

- **How will this affect my accounts with LPL?** Your investment accounts with LPL are not being altered in any way. There is nothing for you to do, and it will be business as usual.
- **Will your office location change?** Yes, we will be moving to centrally located Five Greentree Center in Marlton, NJ. This beautiful "Class A" office building on Route 73 South is conveniently located within a couple miles of the NJ Turnpike and I-295. The anticipated occupancy date for our new location is March 1st, 2018. Our phone and fax numbers will remain the same.
- **What if I have more questions?** As always, if you ever have any questions or concerns, please contact our office at 856-782-1600.