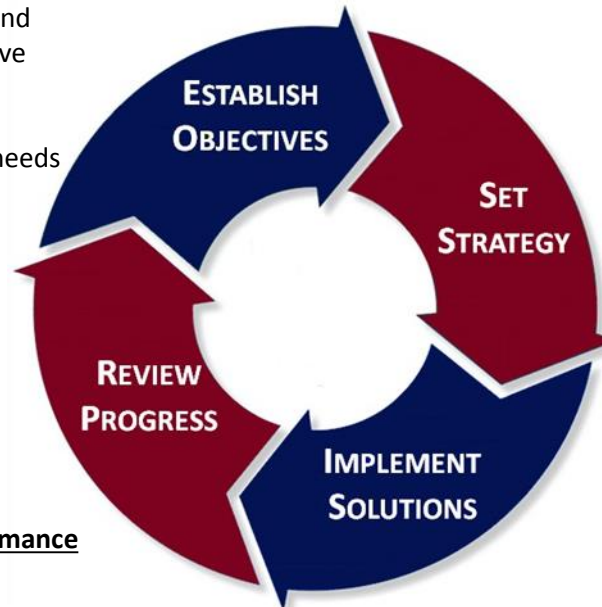


Wealth Management Approach

We utilize a suite of flexible Wealth Management tools to help you develop and implement customized solutions that directly address your personal needs and objectives.

Our user-friendly discovery process :

- ❖ Gain a perspective on your assets, liabilities and overall financial situation using both qualitative and quantitative information.
- ❖ Identify and prioritize your specific financial needs and goals.



Regularly meet to conduct personalized performance reviews :

- ❖ Examine your progress
- ❖ Analyze wealth projections
- ❖ Measures results against your financial plan
In order to make any necessary adjustments if needed

Strategize based on initial objectives :

- ❖ With Money Guide Pro's sophisticated modeling tools and in-depth analysis, we build a plan that addresses your objectives and works with the other aspects of your financial plan.
- ❖ Depending on the life stage of the client, we identify the specific long term and/or short term objectives

Implementation that addresses your goals and risk tolerance :

- ❖ Assess a wide range of investment strategies and solutions
- ❖ Consult the best available research and industry thought leadership to make well-informed investment decisions.