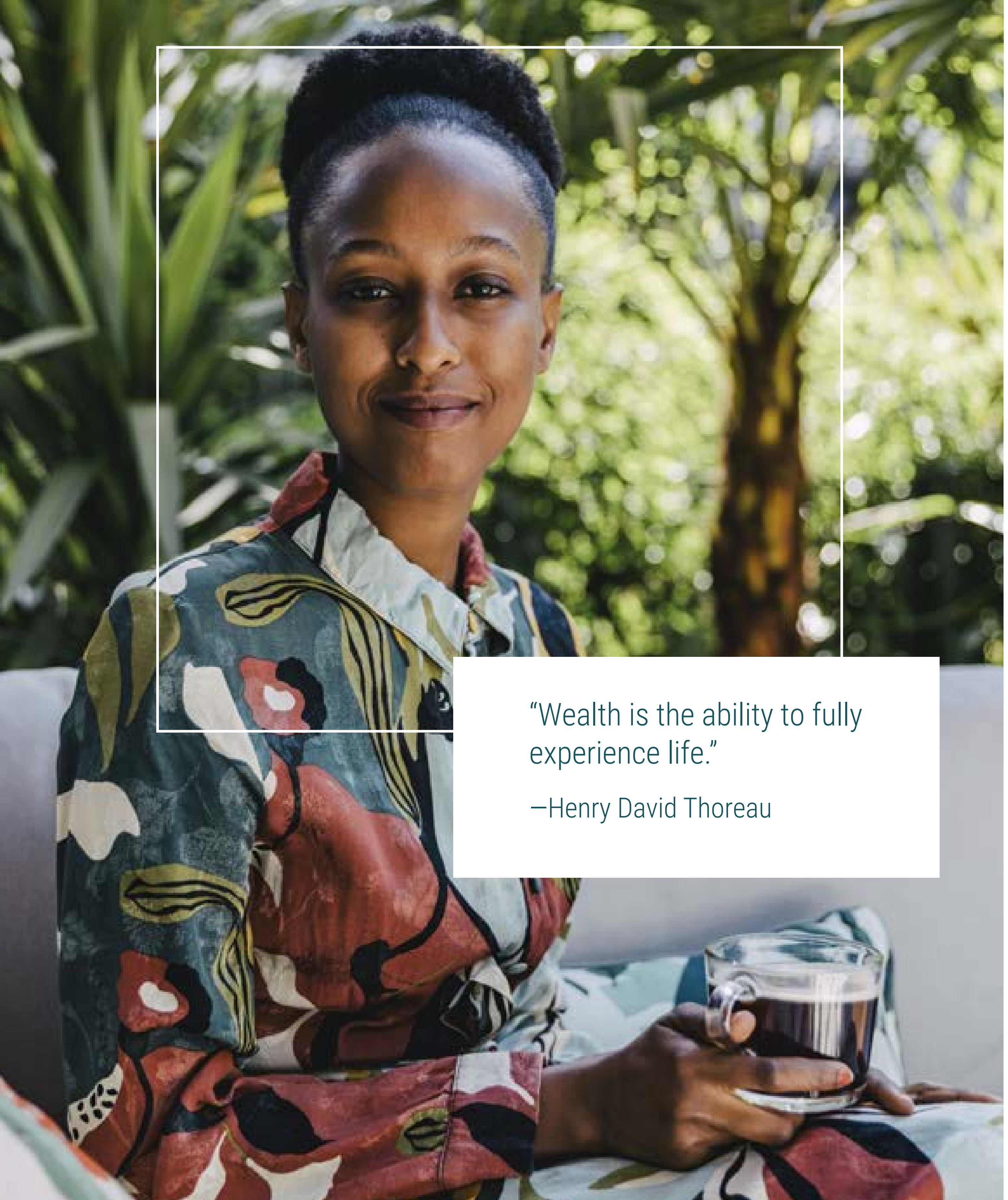
Sagemark Consulting℠

Sagemark Private Wealth Services

Reimagine what's possible

Planning for a life well lived

What does it mean to have a life well lived? Everyone has their own definition. For many, it means knowing you're creating a tradition of excellence that those closest to you will embrace, honor, and carry into the next generation.



> "Wealth is the ability to fully experience life."
>
> —Henry David Thoreau

A focus on values

Reaching your aspirations doesn't happen overnight. The journey requires a significant commitment of time and the application of deep values and character.

At **Sagemark Private Wealth Services**, we look at wealth management much the same way.

Like you, we believe great wealth consists of more than assets and investments alone. It's not only about what you've accumulated, but what you can accomplish with it—and the freedom it provides to focus on what's truly important.

Stewardship of your vision & legacy

If this doesn't sound like what you're used to hearing from a premier wealth manager, it's because we really are different. And we invite you to reimagine what's possible.

Sagemark has specialized in working with high-net-worth and ultra-high-net-worth individuals and families for more than 25 years. Our foremost priority is to get to know you, listen intently, understand your personal mission and vision, and earn your friendship and trust.

Then together we'll chart your course and take carefully designed steps to get there, walking beside you and adapting to new environments along the way. Furthermore, we'll guide your loved ones on practicing meticulous, attentive stewardship of your legacy for years to come.

Perspective driven by purpose

Sagemark Private Wealth Services consultants are fully committed to helping you achieve a life well lived. As you pursue this path, picture where you see yourself tomorrow—both in the near future and long-term. Once the image comes into view, consider who you're really doing it for, and why. Often times, contemplating your true purpose will cause you to rethink your financial plan.

Essential factors that can put your motivations and purpose into perspective

Are we OK?

You may still wonder, "How much do we need to maintain our lifestyle?"

Is our family OK?

Once you and your spouse or partner are "OK," what does it mean for your family to be "OK?"

Is our community OK?

Will you be able to give back to the community or charities?

Dynamic financial consultation

Attaining a higher echelon of success has put you in a position to expect more from a wealth manager. And your needs are more diverse and complex than most. That's a challenge we welcome.

We'll craft a dynamic financial blueprint that incorporates your inputs with our expertise to deliver optimal outcomes.

This plan will be fully integrated and executed with precision to help ensure each component of your portfolio works in concert to maximize growth potential.

Here's what an integrated approach may look like for you

Asset Protection

Intelligent investing

Revocable & irrevocable trust analysis

Beneficiary alignment

College funding

Alternative investments

Retirement Mapping

Cash flow analysis

Investment Rate of Return

Inflation impact

Risk tolerance

Death & disability impact

Estate Planning Strategies

Distribution provisions

Multi-generational

Dynasty concerns

Generation skipping

Estate settlement costs

Divorce, liability, & creditors

Business Owner Strategies

Succession to family members

Exit planning to non-family owners

Key executive planning

Qualified & non-qualified plan analysis

Specialized Planning

Tax reduction & protection

Property & casualty coverage*

Long-term care

Health care

While each of these plan elements can be critical pieces of a sophisticated wealth strategy, your portfolio will be configured to your specifications at each life stage.

*This product is not offered by our firm.

You at the nexus

Sagemark Private Wealth Services consultants have vast experience helping affluent individuals and families preserve, safeguard, and elevate the growth of their hard-earned assets and investments.

Our philosophy and approach is founded on enhancing, sustaining, and securing your long-term financial prosperity. But it takes more than reacting to the whims of the markets or government legislation. We proactively scan the horizon for threats to guard against and opportunities for you to capitalize on.

And along with our nationally renowned team of industry leaders and experienced professionals, we provide concierge-level service that puts you at the nexus of everything we do.

What matters most

You've come too far and accomplished too much to simply accept a templated approach to wealth management. With Sagemark, you can rest assured that we're dedicated solely to advancing the best interests of you and your loved ones today, tomorrow, and beyond.

In the end, what matters most is that you're on the right trajectory to achieve true financial security and leave a lasting family heritage. After all, being able to empower the people and the community you care about is the ultimate reward for a life well lived.

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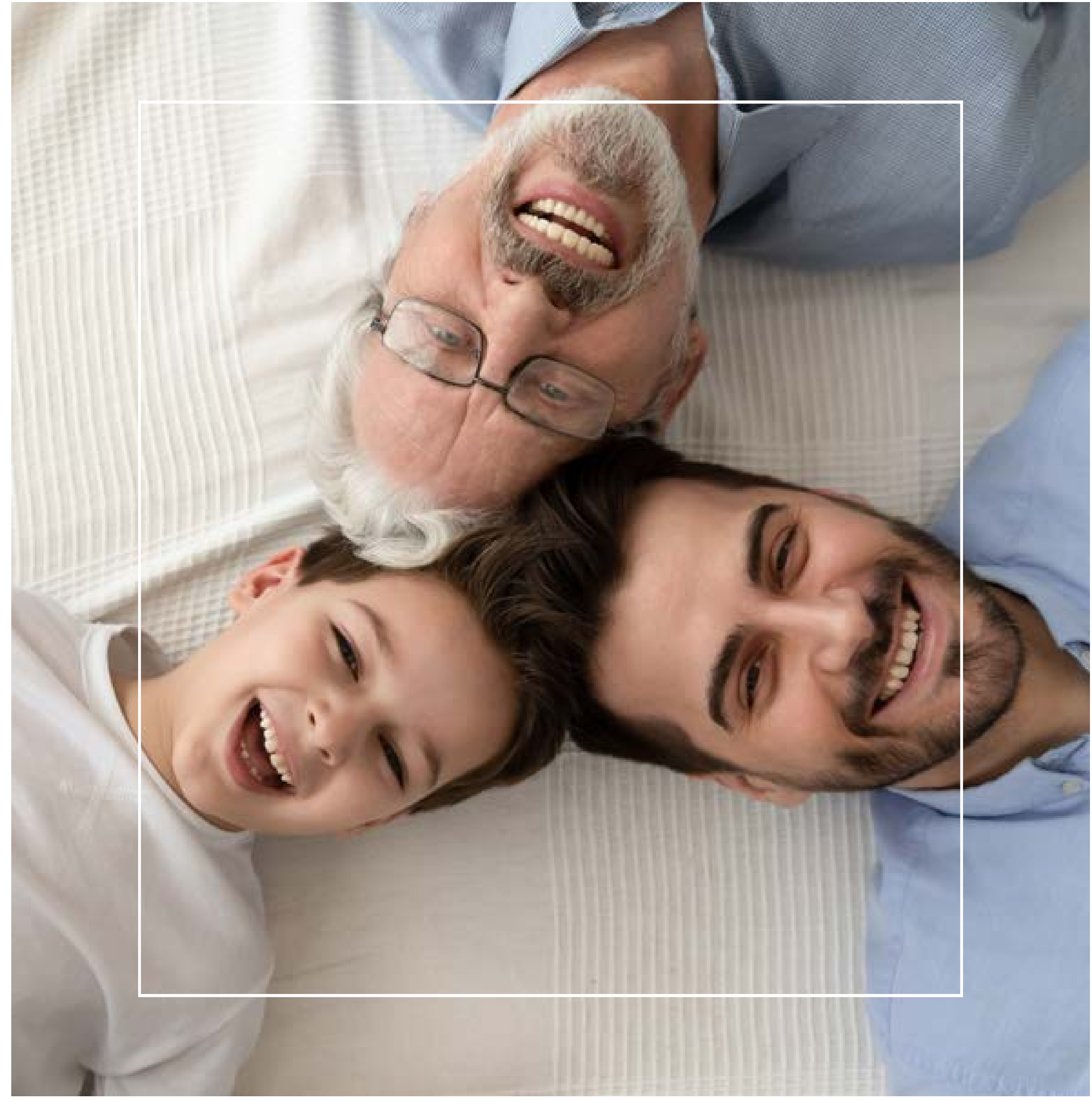

Connect with us now to benefit from dynamic wealth planning guided by sage advice.

Sagemark Private Wealth Services

CRN-6684077-061024
8/24 **Z02**
Order code: CH-SHNWB-BRC001

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