

Investments for Your Generation



We understand that you may not want to manage your investments exactly like your parents or grandparents did. You are busier and have more access to information at your fingertips than the previous generations ever had. We are committed to bringing you unsurpassed service, tools and advice delivered in a way that is unique to you.

Here's how we can efficiently work with you:

- We will consult with you in person, by phone or video conference based on your preferred method.
- We will deliver ongoing support at the frequency, and via the means, that work for your lifestyle.
- We will provide ongoing support and analysis

on topics such as education savings, retirement savings, insurance needs, and asset allocation.

- You can access our financial planning software to input your data and run scenarios from wherever you are and whenever you have time.
- You will have access to professional money manager solutions as appropriate.
- You will have online access to your accounts, e-delivery, and continued access to the financial planning analysis tools to monitor your progress and modify your needs as appropriate.

Research us at benjaminfedwards.com and on YouTube, join us on LinkedIn and follow us on Facebook and Twitter. ■