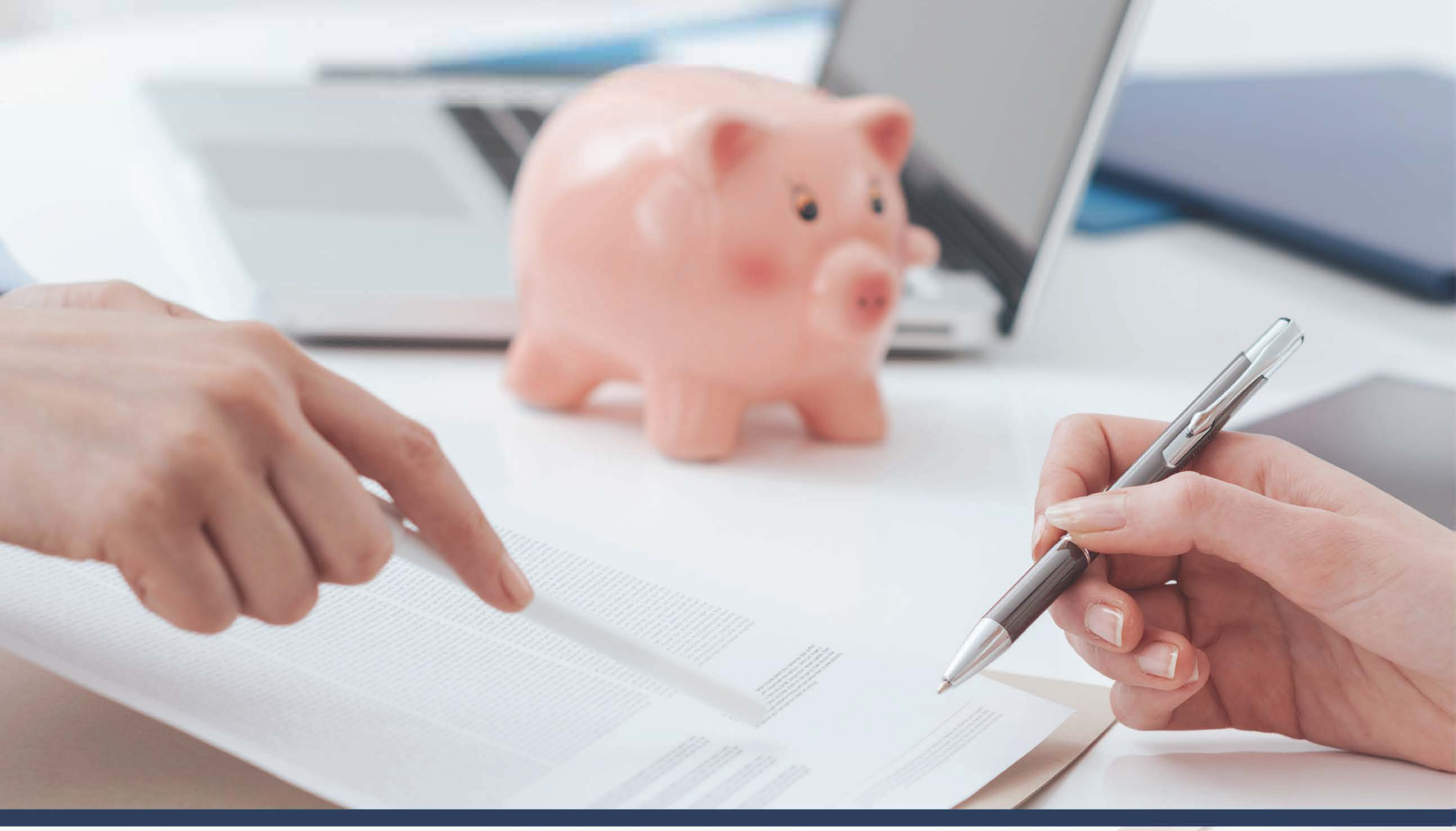
STRATEGIC PARTNERS
FINANCIAL GROUP

PROSPECTIVE CLIENT
E-KIT



Your Vision. Our Focus.

2081 N Webb Rd., Wichita, KS 67206 | P: 316-201-6760 | 8151 W 44th Ave., Wheatridge, CO 80033 | P: 303-396-6128
1618 Main St. Great Bend, KS 67530 | P: 620-793-9999 | 105 S 4th Ave., Laramie, WY 82070 | P: 307-742-6279
F: 866-283-223 | info@spfgnow.com | www.spfgnow.com

WELCOME

On behalf of our entire team, thank you for taking the time to learn about our firm. We hope that this information is useful to you, regardless of whether we are ultimately the right fit for each other. We take great pride in being a dynamic, client-centric, independent firm, and feel that our firm's size lends itself nicely to clients in search of more structure than a solo practitioner can offer and more fee and service flexibility than many of the larger financial firms in the marketplace.

HOW WE'RE DIFFERENT

In an industry where the media has largely reduced "tailored strategies" and "independent advice" to nothing more than buzz words, what makes us different are our values, our process, and our people.

OUR VALUES

HONESTY . TRANSPARENCY . ACCOUNTABILITY

Whether interacting with clients or interacting within our team, each and every one of our firm's team members shares these three traits. As a result, most of our clients are the type of people that equally appreciate these values from their advisory team, and we take great pride in holding ourselves to these standards at all times.

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OUR PROCESS

Our relationship with you begins with mutually developing your customized Investment Policy Statement. This document specifies important details such as risk exposure limits, portfolio asset exclusion preferences, and portfolio tax management needs. Your portfolio is actively monitored and adjusted throughout the year, and is meant to evolve as your financial, family, and healthcare needs change.

Throughout the course of the year, you will experience multiple engagements with your advisory team. These include establishing and revising goals, auditing insurance portfolios, and collaborating with your existing tax advisor to minimize current and future tax burdens.

At least once per quarter, our firm's Investment Committee updates our 90 day economic outlook. Your portfolio is then adjusted accordingly to ensure that it is truly being actively managed.

OUR PEOPLE

Never (in our humble opinion) has there ever been a better example of "the whole being greater than the sum of its parts" than in our firm. While all of our team members are amazing people and tremendous individual assets to our clients, our firm, and our community, what sets our team apart is their collective focus on delivering on our promise of core values to each and every one of our clients.

By empowering each team member to accommodate your day-to-day needs and to solve your problems quickly and efficiently, you will have multiple points of contact within your advisory team, and our team members will continue to grow professionally.

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OUR HISTORY

After spending the first eight years of his career working as a Financial Planner for a large financial services firm, Jason Brotsky founded our firm in 2010 with a simple vision to do great work for clients that truly matters in their day-to-day lives, while eliminating conflicts of interest and working independently for his clients.

As our firm and its staffing needs has grown and evolved, we have continued to put significant time and resources into ensuring that each one of our clients have a consistent experience when working with our team.

OUR FEE PHILOSOPHY

We often hear stories of financial advisors claiming to sit on the "same side of the table" as their clients, yet those advisors seem to often be paid a commission for their ideas and for transactions and activity in their clients' accounts, regardless of how well things are going in the clients' portfolios. That doesn't seem quite right to us.

We're proud to be a transparent, fee-based wealth management team. What that means to you is that our advice and recommendations are comprehensive, knowledgeable, and motivated solely by a desire to ensure that your assets and income are able to accommodate your desired lifestyle and long term planning goals.

Due to fewer layers of corporate management and less overhead costs, we feel that our firm offers a strong value proposition to clients interested in a long-term professional relationship founded on our core values of honesty, transparency, and accountability. In addition, our structure rewards client loyalty and our professional fees are disclosed on all account performance statements.

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OUR SERVICES

We believe that your advisory team should adapt to meet your ever-changing needs - not the other way around. You'll find that to be apparent in our array of professional service offerings available to our clients.

PORTFOLIO MANAGEMENT

Representing our professional roots and core area of expertise, our independent portfolio management services allow for complete transparency while providing a wide variety of financial tools to assist you in efficiently managing your portfolio.

FINANCIAL PLANNING

Allows you to quantify your financial dangers and opportunities and proactively track progress toward meeting your goals.

INDEPENDENT INSURANCE AUDIT AND BROKERAGE

Enables you to audit your life, health, property and casualty, and professional liability insurance coverages to ensure that all gaps are identified and all premiums costs are fair and reasonable.

**** Note - Financial Planning and Independent Insurance Audit services are included at no additional fee for Portfolio Management clients.***

WHAT HAPPENS NEXT?

Ready to take the next step to see if we're a fit for each other? If so, we'd love to schedule a complimentary tour of our office so our leadership team can answer any and all of your questions regarding our backgrounds, professional services, fee structure, or any other topic that may be important to you.

To schedule your initial discussion at a time that is convenient for you, feel free to contact one of our offices or visit us at www.spfgnow.com.

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