

INDIVIDUAL WEALTH MANAGEMENT &
FINANCIAL PLANNING SERVICES

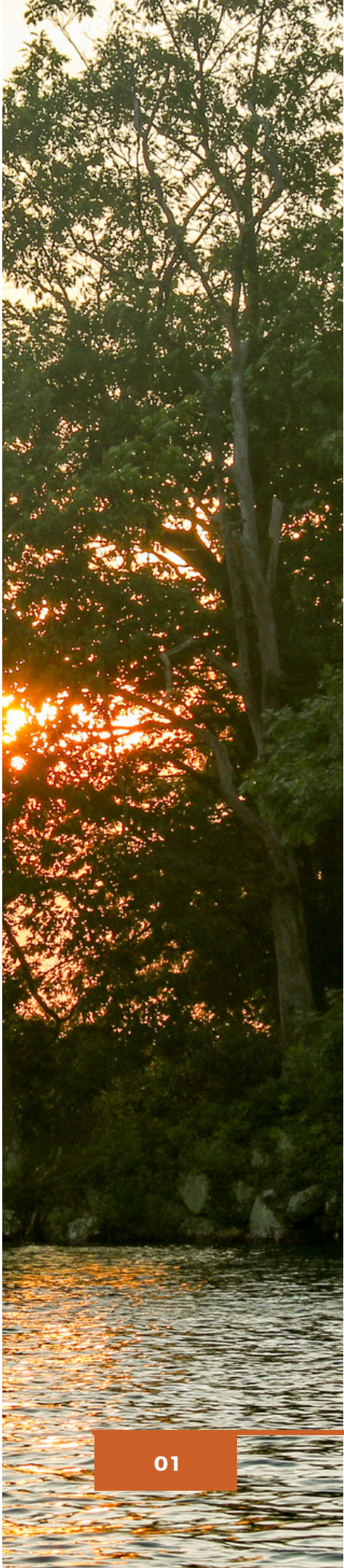
DESIGN YOUR FUTURE WITH A TRUSTED PARTNER



DESCHUTES
INVESTMENT CONSULTING, LLC

DESCHUTES INVESTMENT CONSULTING

200 SW Market Street, Ste. 550
Portland, OR 97201
503-224-3700
www.deschutesinvestment.com



MEET THE TEAM



THE DESCHUTES DIFFERENCE

Fiduciaries & Fee-Only Investment Advisors

We are a boutique firm, smaller, specialized, enabling us to treat our clients like friends and family, providing the personalized advice expected of a high touch firm. Our team puts our clients first, and that is truly our passion. Our goal is for you to feel informed about your current financial picture and secure in the process of building your future with Deschutes.

Personal Advisor Relationship

You will have direct access to an advisor who will get to know you. While we do use top of the line technology to help our clients, we know the best service is still done by skilled compassionate people.

Team of Experts

Deschutes clients have access to the expertise of the entire team of professionals. This includes specialists in retirement planning, estate plan issues, tax-efficiency, charitable giving, and of course, investment management. Our highly personalized approach to investment management is a key differentiator.

WHO WE ARE

We are your financial advocate.

We take the time to understand what you want out of life - for yourself and for your family.

We employ a comprehensive planning approach combined with sophisticated technology designed to optimize your results and help you achieve your financial goals.

We understand that unexpected events and life changes can impact your dreams. We monitor and track your progress every day and work with you to adjust your financial plans along the way.

We have years of experience collaborating with clients like you. We believe your financial information should be organized, current, easy to understand and accessible to you wherever you are.

AS YOUR FINANCIAL ADVOCATE, YOUR SUCCESS IS OUR SUCCESS.

“
GO CONFIDENTLY IN
THE DIRECTION OF
YOUR DREAMS. LIVE
THE LIFE YOU HAVE
IMAGINED.
”

- Henry David Thoreau



WHAT WE DO

Our Planning Process Can Help You Achieve Your Financial Dreams.

We start by helping you identify your goals and evaluate your current financial situation.

Then we work with you to modify and perfect your approach to achieving your financial goals.

We don't stop there. We help you implement the recommendations. Then, we continually monitor your financial situation to ensure you remain on track to achieve your financial dreams.

Your Goals Remain The Centerpiece Of Our Recommendations & Strategies.



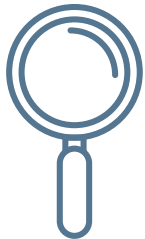
HOW WE DO IT

We take a comprehensive view of your complete financial picture to develop a deeper understanding of what is required to achieve your goals.



Complete Financial Picture

We link all your financial accounts for a complete and up-to-date view of your financial situation. Our analysis and recommendations are comprehensive and reflect current market conditions.



Monitor Progress

With a daily snapshot of your progress, we alert and remind you of financial factors that may impact your ability to achieve your goals. This relieves you of organizational burden, allowing you to focus your energies on what matters most in your life.



Increased Collaboration

Our wealth management system provides both you and our team with a secure view of your financial progress. We collaborate with you online at any time, no matter where you are.

PROTECT YOUR IMPORTANT DOCUMENTS

VAULT CHECKLIST

With unlimited secure document storage, you can organize and protect your most important documents. Review the checklist below & start adding to your vault today!

LEGAL DOCUMENTS

- Wills
- Deeds
- Revocable & Irrevocable Trusts
- Power of Attorney
- Codicils (Supplements made to a Will)
- Living Wills/Health Directives
- Prenuptial Agreements
- Buy/Sell Agreements
- Contracts

BENEFITS

- Social Security Info
- Veteran 's Administration Info
- Employment Benefits

INSURANCE POLICIES

- (Life, LTD, Disability, Medical, Car, Property)

BANK & INVESTMENT STATEMENTS

- Pensions, IRAs, Annuities, etc.
- InvestmentAccounts
- Stock Options/Certificates

LIABILITIES

- List of Credit Cards with Contact Information
- Mortgages
- Loans

TAXES

- Tax Returns
- W-2 Forms

IDENTIFICATION

- Birth Certificates
- Drivers Licenses
- Passports
- Social Security Cards

FAMILY

- Adoption Papers
- Medical Records
- Marriage License
- Pictures
- Audio Files
- Video Clips

PROPERTY

- Titles to Homes, Autos, Boats, etc.
- Warranties

TAKE CONTROL OF YOUR FINANCIAL WORLD

Your Personal Financial Website makes it easy to manage both your wealth and your well-being.



ORGANIZE. MONITOR. COLLABORATE.



ORGANIZER

Connect all your accounts for a consolidated view of your entire financial picture.



INVESTMENTS

Interactive charts & detailed views help monitor all your accounts.



SCREEN SHARING

Join a screen-sharing session for interactive planning anytime, anywhere.



VAULT

Safely store your most important financial documents, accessible 24/7.



TRACK SPENDING

Know how much you're spending, and where.



BUDGETING TOOLS

Set budgets to help reach your savings goals.



MOBILE

A complete financial picture available on your smartphone.



GOALS

See if you're on target to reach your most important goals.



FEES FOR INDIVIDUAL SERVICES

INVESTMENT MANAGEMENT

Our Standard Advisory fee is 1% on the assets we manage up to \$1MM. Advisory fees automatically decrease above \$1MM.

COMPREHENSIVE FINANCIAL PLANNING

Our Standard Comprehensive Planning fees are a \$3,500 one-time set-up fee, and a minimum of \$350K under management.

INSURANCE SERVICES

Actual fees for life insurance, long term care and other insurance services are based on underwriting and specific product(s).

For more information, please see our Firm ADV Brochure for complete details of our services and fees. Request a copy from your Deschutes advisor or Laura@deschutesinvestment.com

TEAM MEMBERS

MEET OUR ADVISORS



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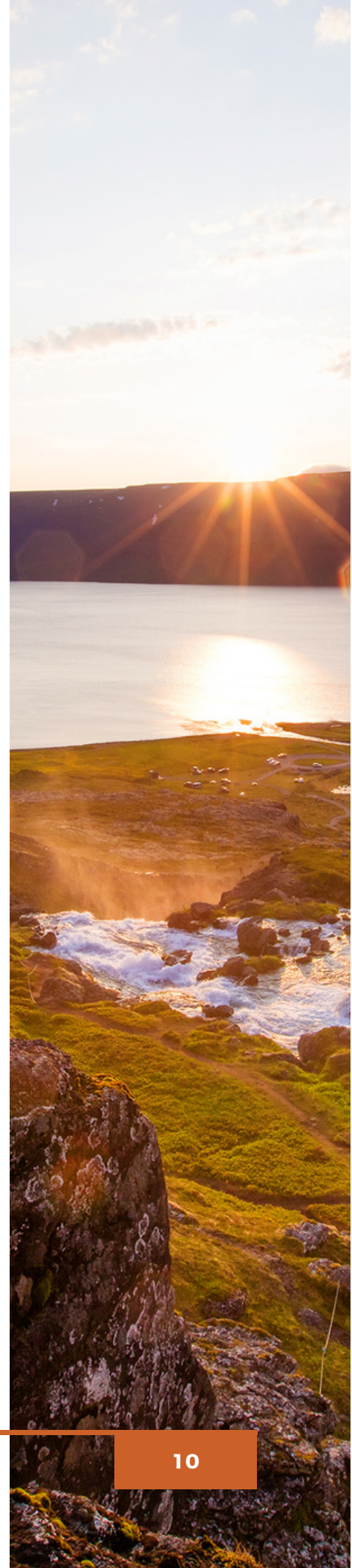


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