STORY WEALTH

MANAGEMENT GROUP

Your Story Begins here…

What you should expect from Story Wealth

Helping you achieve your financial goals is the most important thing we do. Everything we do is to that end. Once we understand your goals, a personalized plan is created for you. We consider your situation ... Your Story.

Although there are many things we discuss with you in the planning process to determine your investment mix, your investment portfolio is ultimately a product of your needs. Your investment portfolio can include cash, stocks, bonds, exchange traded funds, alternative investments and other securities.

With your agreement and understanding your portfolio is invested accordingly and adjusted as your objectives and market conditions change.

At Story Wealth, we have a process that works. We will help you prepare for the future by working progressively through Investment, Financial, Tax and Estate issues to help you and your family.

Our team will always be your dedicated point of contact. We always know your name and will provide personal attention dedicated to your needs. In addition, you will be invited to learn more about subjects and strategies designed to help our clients through a series of local workshops, presentations and white papers available through our website.

All clearing accounts with Story Wealth Management Group are held at Pershing Clearing Corp., LLC, a subsidiary of Bank of New York. You can access your accounts and statement information through the internet. This way, information about your portfolio is available any time.

Accounts can also be with First Clearing Corp., a subsidiary of Wells Fargo Bank.

You are in good company

Our clients value professional experience and advice. Many are retired and drawing an income. Some of our clients are working and currently adding to their portfolio.

Russ Story, RFC, Financial Advisor has over 25 years of experience and has helped hundreds of individuals, corporations, trust accounts, lottery winners and families pursue their goals.

Facts to Consider

As an independent firm, we are not employees of a big brokerage house. We provide advice and recommendations that are independent and unbiased.

Proudly offering our clients products and services second to none, our investment process is designed to help manage risk and return. Recommendations are unique to you and your situation. No "cookie cutter" approach here.

We are small enough to know you. You and your goals are important to us. We form lasting and personal friendships with our clients.

We have the support of the largest clearing firm in the country behind us, Pershing Clearing Corp. LLC a subsidiary of Bank of New York. Pershing is the largest investment clearing firm in the industry. We enjoy offering you a variety of resource of products and services through this clearing firm arrangement.

We offer money market, electronic bill pay, check writing and a line of credit through our clearing firms.

Hundreds of individual investors and many institutions across the country have chosen Story Wealth to manage their assets.

We take care of every aspect of the investment process, including account set up, asset transfers, asset allocation and the trading of securities.

Founder and President Russ Story, RFC®, has been recognized by financial publications across the country. Russ has over 25 years' experience and has been in Douglas for over 23 years. Mr. Story is a Registered Financial Consultant®. He has been quoted in the industry publication Registered Rep. Magazine, National Fruit Growers News and is featured on "Christian Perspective" radio show Thursdays at 10 a.m. on WULS radio. He is past President of the local LIONS club chapter and an active member. He currently serves on the Coffee Regional Medical Center Hospital Authority board and has served as finance committee Chairman at Douglas' First Baptist Church. Russ has served on the South Georgia State College endowment board. He has coached girls' softball teams for years and recently his team was "Georgia GRPA State Runner- Up" in 2012. He is married to Julie and together they have 8 children.

You know what your cost will be and it will be fair

If you open a fee based account, your fees are based on the value of your investments within the account. The fee may vary from 1% to 3% depending on the program and the amount invested. On non-fee based, or "commissionable" investments, we are paid a commission rather than an ongoing fee.

Regardless of the mix when you do well, we do well.

Ways you can benefit by choosing Story Wealth

Your Investments will be tailored to fit YOUR needs.

Different people have different needs. Some want their investments to grow while others want an income. Many investors have extra risk exposure due to their business or other issues and need to exclude certain industries from their portfolio.

Some investors desire to exclude certain industries due to religious beliefs. Your portfolio recommendation is based on your specific needs. Thoroughly understanding your goals, time horizon, tax situation and other objectives is the first step.

Proper understanding helps ensure you are comfortable with your investments.

Communication and education to keep you comfortable and up to date

We keep you up to date on your portfolio in many ways. You will not only get statements in the mail every month, but we will stay in constant communication to help you remain comfortable with your portfolio.

Constant research to reduce risk and enhance return

We go through a constant "vetting" process when it comes to keeping you invested in potentially well performing investments. We use many screens and outside research tools to keep us up to date.

A well-designed asset allocation model using a disciplined approach

We will take the time to help you understand what we do and how. You deserve more than just a stock picker. You deserve a strategy that is tailored to fit YOUR needs.

Proper understanding helps ensure you are comfortable with your investments.

We look for global opportunities

Most Americans think only about U.S. Investment opportunities. Fact is, we only make up a portion of the world's trading market. Some of the world's best run companies are outside of the United States. Global diversification certainly has its benefits. You can take advantage of opportunities that many Americans miss.

A flexible investment approach

We are flexible and forward looking. If we think small companies will do better than large companies for a period, we may recommend that you over-weight small companies in your portfolio. If we think it's more appropriate to be in bonds or cash, you may be invested in those asset classes.

You get a comprehensive and disciplined approach to your investment strategy

There are many investments in the Investment World. There are over 10,000 stocks traded on U.S. markets. There are over 50,000 stocks globally traded on various exchanges around the world. At Story Wealth Management Group, we use several historically successful strategies.

Among our recommendations are various managed accounts, unit investment trusts, and other methods designed to potentially increase return and help reduce risk. However, keep in mind that past performance does not guarantee future results. We typically utilize a tactical style and adjust the asset allocation per market conditions and future potential of asset classes. Rebalancing is always considered important.

Asset Allocation is of utmost importance

We believe that much of your long-term success comes from asset allocation mix. When it comes to your investments, we believe this is one of the most important decisions we make together. Operating under the assumption that only a portion of your return is the result of the actual choices inside the asset class. Specific investments can certainly impact the account return over time.

We believe an informed client is a happy client.

We want to keep you up to date and educated on our process and strategies.

You are supported by a strong group on many levels.

You should expect to receive client service that is second to none.

As our client, you should understand:

What is going on inside your account and why.

Our multi-step process for covering different issues progressively.

Your advisor reviews and updates your goals and objectives on a regular basis.

Expect to have your administrative tasks handled promptly and smoothly. When you need a check or other service request, you don't deserve to have it delayed for any reason

To help meet your needs, we have access to a very broad set of resources, from trading to research to administration support, our back-office support is capable and excellent.

You will enjoy material to read and watch for:

Weekly market commentary from Russ Story, RFC® and Story Wealth Management Group

Monthly Market Commentary by mail (if you do not have an email address on file)

Quarterly phone reviews

Annual face to face reviews

Account Access through Pershing Clearing Corp, LLC Member FINRA/SIPC

Trade confirmations via mail

Monthly or Quarterly Statements

Online access to your account 24 hours a day via the internet

You may attend Workshops that provide timely information concerning:

Market updates

Latest information concerning tax and risk management Lunch or dinner events

Client conference calls …These enable us to communicate timely information to our clients and provide the information efficiently to client from coast to coast.

You will work with a Stable Wealth Management Team at a well-established Firm.

Your investment and financial planning will be overseen by Russ Story personally if we accept your account. We have over 35 years Combined Industry Experience

You should feel comfortable knowing that time and time again clients are referred to Story Wealth because of the service experienced by friends, neighbors and other clients.

Your investment account will be allocated to best fit your objectives… tell us…what's your STORY?

Depending on your needs, we construct a portfolio. EVERY person is different. Here are some of the issues we consider:

Investment Objective: Do you desire long term growth or do you need a certain level of income now?

Cash Flow: How we invest your portfolio is determined by your cash flow needs.

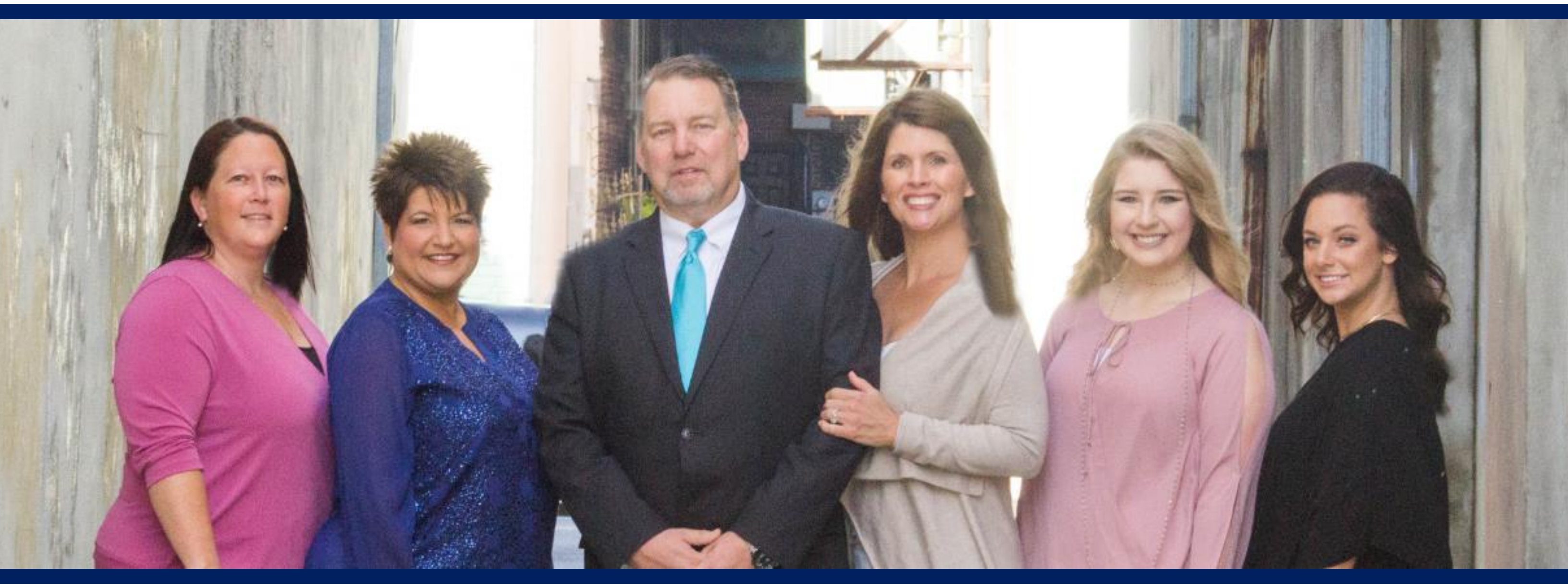
Time Horizon: When will you need your money? How long can your investments be left to potentially grow without drawing off capital? **Your Tax status**

Outside resources: How does your investment portfolio fit into your overall net worth? Do you receive income from other sources?

Capital Gain Tax Management: We must manage the impact of capital gains on your portfolio.

Risk Tolerance: Your comfort level concerning investment risk and potential account value fluctuation is determined by you.

As your needs change, so does your portfolio. We must update and re-evaluate regularly to keep you moving forward as goals and objectives change over time.



Russ Story

Registered Financial Consult®, Financial Advisor

Recognized by Registered Rep Magazine for helping clients

Weekly Radio Broadcast on WULS radio (available via internet)

Writes for numerous newspapers and is featured every week

Investment Advisor Representative of Summit Financial Group, LLC.

Russ is married to Julie Mangum Story (1990 Taylor County, Florida High Homecoming Queen) and together that have 8 children.

Mr. Story has lectured at the University of Georgia on issues of retirement planning and finance.

He is Past President of the Local Chapter LIONS Club. Russ has been an instructor at South Georgia State College and taught investment classes for women and beginners.

Memberships

- Academy of Financial Services
- National Council on Aging
- Children of Aging Parents
- Member AARP
- National Registry of Financial Service Representatives
- National Registry of Who's Who for Executives and Professionals- 2002
- Douglas Coffee County Chamber of Commerce

Debra Walker

Office Administrator

Mrs. Walker has over 16 years' administration experience. She has lived in Douglas, Georgia since 1994. Debra has an Associate Degree from South Georgia State College.

Debra oversees the Administration duties of the office including account paperwork, asset transfers, client follow-up, and online access to accounts.

Debra is married to LaDon Walker. They attend Douglas Christian Fellowship Church of God. She is a Member of the DCF Ladies Ministry, plays the piano and sings in the choir.

Kristin Westbrook

Marketing Coordinator

Mrs. Westbrook moved to Ambrose, Georgia in October 2015. She is originally from Lakeland, Florida. Kristin has a Bachelor Degree in Business Management and currently pursues her Master's Degree in Internet Marketing. She began working for Story Wealth Management Group in 2017.

As the Marketing Coordinator, Kristin oversees the organization and implementation of advertising and marketing activities for the office. She maintains the website and posts material to social media. In addition, Kristin manages community and client events such as fundraisers, workshops, and seminars.

Kristin is married to William Westbrook. Together they share two children, an 18-year-old son and 3-year-old daughter. In their spare time, the family enjoys playing outside and fishing.

Julie Story

Accounts Payable

Julie is the wife of Russ Story, President of Story Wealth Management Group. She has lived in Douglas, Georgia since 2012 and has helped with general office duties and accounts payable since March 2014.

Mrs. Story earned her Bachelor of Science Degree in Child Family and Consumer Services from Florida State University. She has ten years of experience managing the Social Service Department of a long-term Rehab facility in Perry, Florida.

Important steps to formulating a personal portfolio

1. We sit down and gather information about your goals and objectives. Many Estate, Investment and Tax Planning questions are answered.

2. An analysis is performed on your current investment portfolio to determine if changes should be made and you will receive a written recommended portfolio.

3. Once a plan is formulated, we consult to make sure you are comfortable with the plan.

4. Implementation is achieved subsequent to the account transfer (if need be) and it sometimes takes a few days to finish this process.

5. You are regularly updated on your progress to make sure it meets your ongoing needs.

So… How do we compare?

Story Wealth Management Group	Your Current Advisor
You get a disciplined approach to your investment strategy. We go way beyond stock picking.	?
You can take advantage of global investment opportunities to potentially enhance return.	?
We offer “Alternate Investments’’, non-trade Real Estate Investment Trusts and Limited Partnerships.	?
You are NEVER limited to a single investment strategy like “growth” or “value”	?
Strategies we employ have automatically moved from stocks to cash when indicators dictate and the market gets volatile.	?
We construct your portfolio according to your specific needs. Your cash flow and growth needs. No “cookie cutter approach”.	?
Your financial advisor owns the firm. Russ Story is your Advisor. You talk to him.	?
You meet with the person making the investment recommendations. You sit down face to face or via conference call if you wish.	?
Russ Story, RFC® is your Financial Advisor. He has over 25 years’ experience in the Financial Services Industry.	?

Call us today for a free, no cost or obligation portfolio review….912-384-0030

….. and tell us your Story

Our Purpose

At Story Wealth Management Group, our purpose is to help guide our clients in making the right financial decisions for their future.

We will accomplish this through education, communication and service that exceeds our client's expectations.

Story Wealth Management Group

Your Story Begins Here...

Russ Story, RFC®

Story Wealth Management Group

Financial Advisor

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Email: rstory@storywealth.com

Website: www.storywealth.com

Story Wealth Management Group is an independent firm with securities offered through Summit Brokerage Services, Inc., Member FINRA, SIPC. Advisory services offered through Summit Financial Group, Inc., a Registered Investment Advisor.

Investing involves risk as you may incur a profit or a loss. Please carefully consider investment objectives, risk, charges, and expenses before investing. Past performance cannot guarantee future results.

Summit Brokerage Services, LLC and Story Wealth Management Group do not provide Legal or Tax advice. For services of Legal or Tax advice, please seek the services of a qualified professional