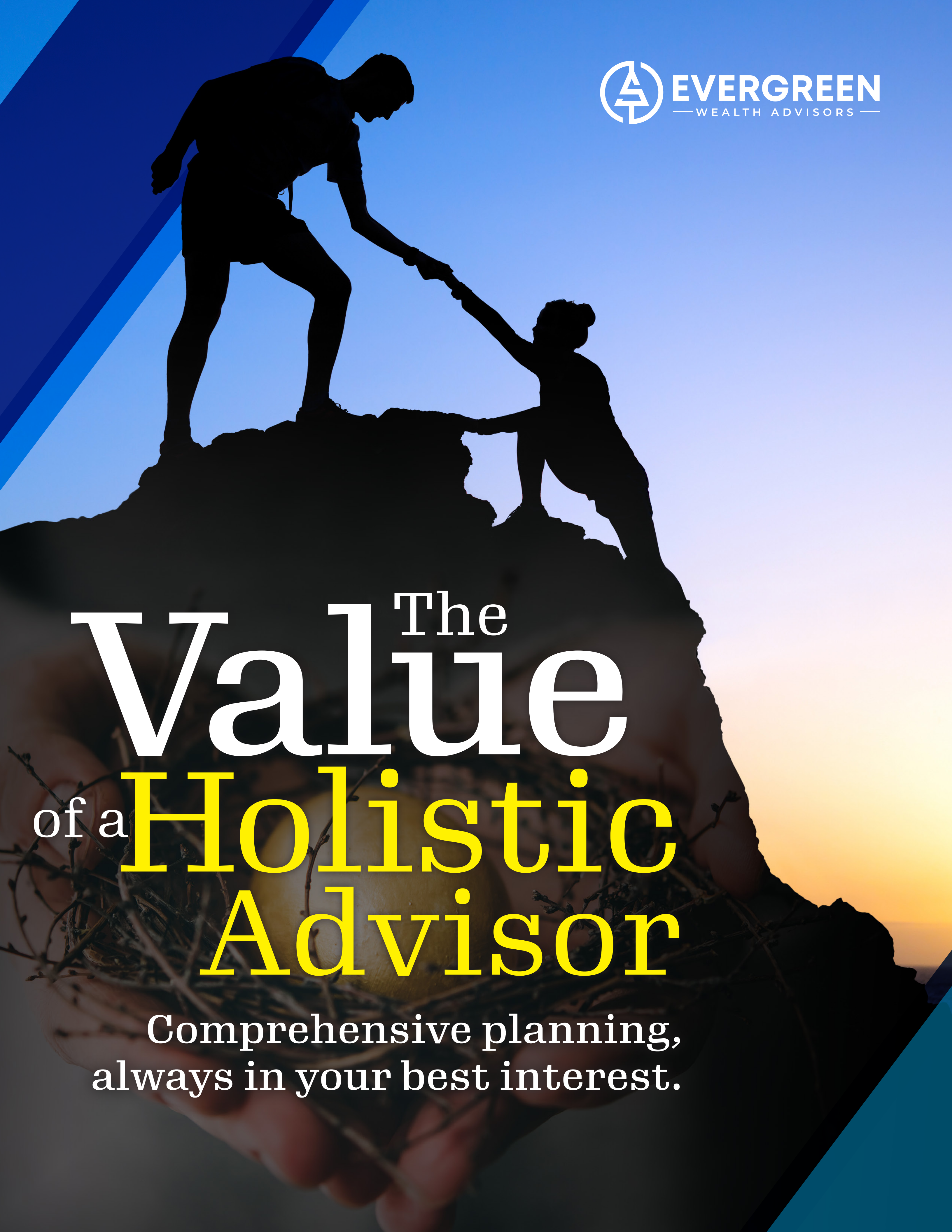
EVERGREEN
WEALTH ADVISORS



The Value of a Holistic Advisor

Comprehensive planning, always in your best interest.

What is a Holistic Advisor?

A holistic advisor looks at the big financial picture and provides advice and recommendations that consider all areas of financial planning.

What is Holistic Financial Planning?

A holistic plan is an integrated approach to orchestrating key areas of your financial life into a single, well-coordinated plan. This includes your taxes, investments, insurance, and legal documents all working together with the same goal in mind.

Why Do I Need A Holistic Financial Plan?

At Evergreen Wealth, our mission is to help you integrate all your hard-earned assets into a plan that optimizes your wealth and helps you achieve your short- and long-term goals, while also reducing critical inefficiencies, including

- Gaps in your plan
- Overlap or overexposure in investments
- Tax inefficiencies & missed savings
- Inconsistent investment strategies
- Missing or outdated legal documents
- Failure to identify and reach pre- and post-retirement income goals
- Misaligned strategies among professionals serving you

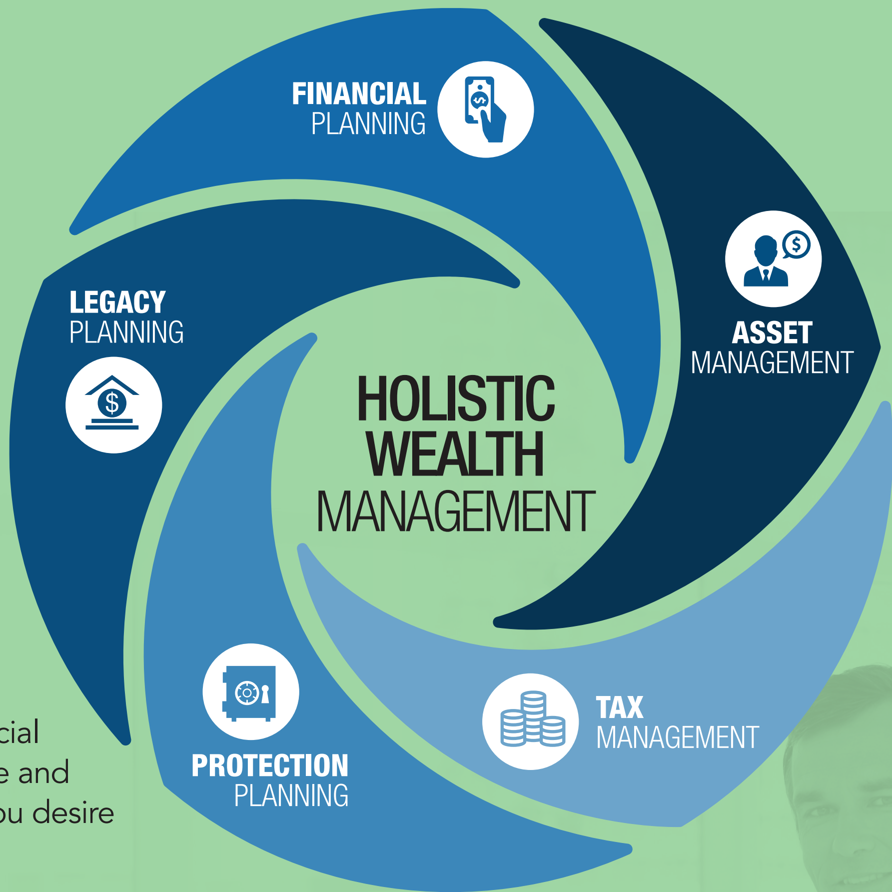
Our Holistic Approach

At Evergreen Wealth, our holistic advisors work on your behalf to coordinate each of the following pillars of your financial life, whether collaborating with an internal team or your established professionals, such as an accountant, broker, attorney, and insurance agent.

To get a clear picture of your financial situation, we'll review your savings and investments, insurance policies, legal documents, tax returns, and more. We will also identify holes or redundancies in any current financial plans to help strengthen what you have.

The 5 Pillars of Holistic Wealth Management

By bringing these critical components together within one comprehensive plan, they can be optimized to work collectively toward your goals.



Financial Planning — The foundation of wealth management

We utilize The Bucket Plan®, a planning philosophy that "buckets" or segments your assets, each with a different time horizon and risk profile based on your unique needs. This process helps to mitigate risks that can disrupt your financial plans to help ensure your future is secure and give you peace of mind to live the life you desire in retirement.

Asset Management — Building and maintaining your total wealth portfolio

As part of your comprehensive financial plan, our holistic advisors will help oversee and advise on your total assets, whether that be retirement accounts, investments, real estate, or business interests. We will work with you to create and continuously monitor a personalized investment portfolio to help you maximize the growth of your money and adapt to the ever-changing market and economic environment to achieve your goals and objectives.

Protection Planning — Safeguarding your wealth by mitigating risks

Protection planning involves assessing and mitigating risks like market volatility and legal liabilities to help protect your wealth. We can achieve this through various strategies, from appropriate insurance coverage to diversifying investments or establishing asset protection trusts.

Tax Management — Maximizing your income by minimizing taxes

It's not what you make, but what you keep, which is why a thorough understanding of the tax implications of each of your financial decisions is critical to holistic planning. We maintain an ongoing understanding of current tax laws to help you optimize your assets and provide proactive solutions to help you maximize your income while minimizing your lifetime tax liability.

Legacy Planning — Ensuring your assets are handled according to your wishes

Legacy planning can be simplified into three questions: Where does your assets go? Who's in charge? What are the rules? We will help you design a legacy plan that provides those answers and meets your needs. Our advisors will see to it that all required documents are in order to ensure your wishes are fulfilled. We also provide a Family Estate Organizer to help you consolidate important and personal files, and we can coordinate with legal professionals for enhanced planning needs.

Get Started

If you have questions in one or more areas of your financial life, our team is here to help provide a comprehensive perspective for your holistic needs. For a complimentary consultation, visit ewadvisors.com or call 509-995-5513 today!

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