CUMMINGS
WEALTH MANAGEMENT GROUP
A BEACON TOWARD YOUR FINANCIAL SUCCESS

SECOND-OPINION SERVICE

Exclusively for Friends, Family and Associates of Our Valued Clients

In this challenging economy, you probably know a friend, family member or colleague who may be in a complex situation or just unhappy with the advice from his or her financial advisor – it's not uncommon. We believe that many high-net-worth investors would value a second opinion on their finances.

In order to help the people, you care about achieve their financial goals, we have created a complimentary, no-obligation Second-Opinion Service. We are pleased to offer your friends, family members and associates the same expertise and guidance that you have come to expect as a valued client of Cummings Wealth Management Group.

Second-Opinion Service

What to expect with our Second-Opinion Service

We believe that advising without planning is taking a shortcut.

We believe that people shouldn't take a shortcut with one of the most important pieces of their life.

We believe one of the most powerful things in your life that you can control is to not take a shortcut.

We will meet with your friends, family members and associates for a Discovery Meeting. I will share with them my passion for coordinated planning and my mission to help people not take a shortcut in this area of their life. Assuming that we both agree that we have a basis for working together, we will move forward with the entire beacon experience.

The Beacon Experience™

I've had the pleasure and privilege of working with some very successful people over the years that have tremendous confidence in their ability to make a lot of money going forward but they lack confidence in what to do with that money. I believe that stems from a lack of coordinated planning and lack of coordination with the other advisor. I see so often where a husband and wife or a business owner is trying to coordinate it all where it's not their core expertise. They've got to be the quarter-back, the one dealing with the business attorney, dealing with the estate attorney, dealing with the CPA, dealing with the insurance advisor, and dealing with the financial advisor. My goal is to become that lighthouse, that beacon, that financial coach, that financial quarter-back to coordinate it all and to become my client's CFO.

I created this unique planning process known as The Beacon Experience™ and this process will:

The Beacon Experience™ exists to ensure that every one of our clients has a coordinated plan to guide them on the course to achieving what is most important in their life.

- Have you had the conversation about maximizing your financial life with your current financial advisor?
- Are you confident that your advisor is making your money work for you and helping you reach your goals?
- What support or help do you need to follow through on making your return on life even better?
- Has your financial plan been tested to ensure you can accomplish your goals?
- Are you living your life with purpose?
- Can you afford to take care of and give to the people you want to help?
- Have you been able to maintain your health without financial stress and feel confident about the future in this regard as well?
- Are you taking the time to do the things you most enjoy and spend time with the people you enjoy most?

It is my life's mission to become a beacon to you to help you achieve what is most important in your life. Helping to provide our clients with financial security through coordinating planning is what we do. Guiding them on a course to achieve what is most important in their life is who we are.

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Let us help you help those you care about.

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