
**Jaylon S. Ellison, CFP®, AIF®**
Chief Investment Officer
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Jaylon initiates each engagement on the tenets of trust and integrity. This fiduciary standard helps us to minimize complexity for our valued clients, develop purposeful recommendations, and provide clear guidance meant to help you achieve your goals.

He and his team are committed to service excellence through a proprietary 4P Approach while quarterbacking other professionals – including your CPA, attorney, and other financial professionals.

Jaylon and his wife, Lauren, reside in Alpharetta, GA, with their two children.

Providing world-class client care since 2001.

Servicing GA, AL, TN, FL, and nationwide.


4P Wealth Trust,
A Member of Advisory Services Network, LLC

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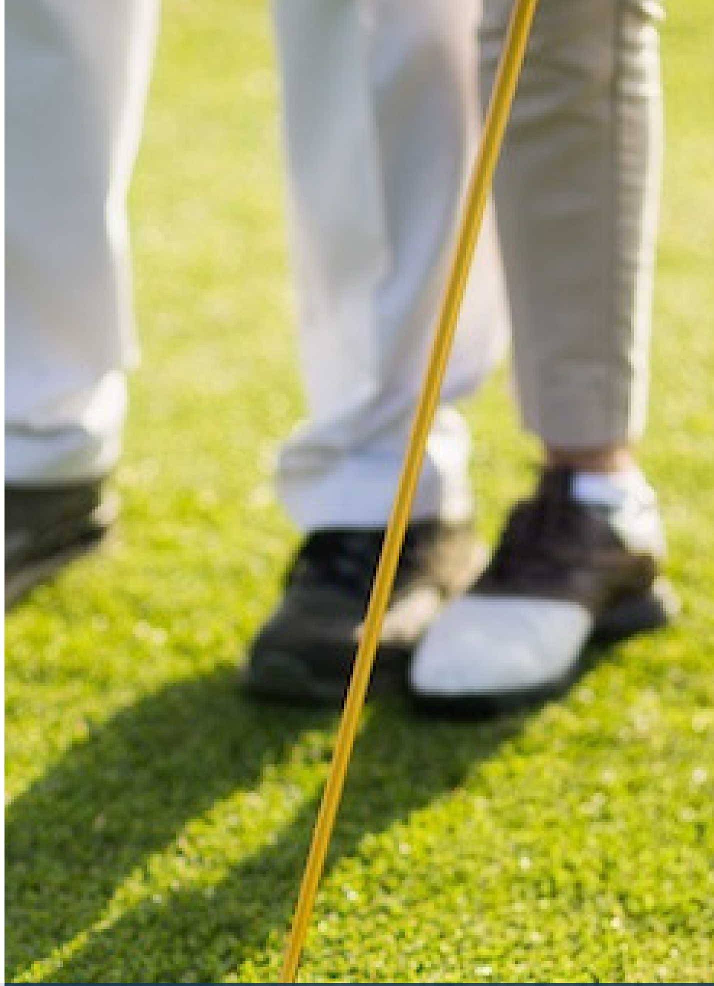
[1]The information in this material is not intended as tax or legal advice. Please consult legal or tax professionals for specific information regarding your individual situation.



# 4P WEALTH TRUST

YOUR FUTURE IS TODAY

A MEMBER OF ADVISORY SERVICES NETWORK, LLC

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# The 4P Approach

Our four cornerstone topics are explored during private conversations. Each topic is meant to identify your core investment motivations so a tailored portfolio plan can be drafted.

## Purpose

What is the purpose of your wealth?

## Prepare

What goals are you or your family preparing for?

## Protect

What strategies are needed to preserve your risk capital?

## Perpetuity

Are we spending, building, preserving, or leaving accumulated wealth?

Honorable.
Reliable.
**At your service.**

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# Our Services

## Investment

Active management of retirement and non-retirement investment vehicles.

**Retirement**

- Traditional IRA
- SEP or Simple IRA
- Roth IRA
- Inherited IRA
- Educational IRA
- Custodial IRA
- 401(k) or 403(b)

**Non-Retirement**

- Brokerage Individual
- Brokerage Joint
- 529 Plan or UTMA
- Sole Proprietorship
- Corporation
- Estate
- Trust

## Financial[1]

Management strategies meant to provide an out-of-the-box perspective for your evolving investment needs.

- Financial Planning
- Tax Strategy
- College Planning
- Income Shifting
- Capital Gains
- Stock Options
- Asset Protection
- Profit Sharing
- Money Purchasing Plan
- Trust & Estate Management
- Distributions
- Withdrawals

## Estate

Irrevocable and revocable trusts, estate account management, and strategic asset depletion plans meant to minimize tax burdens.