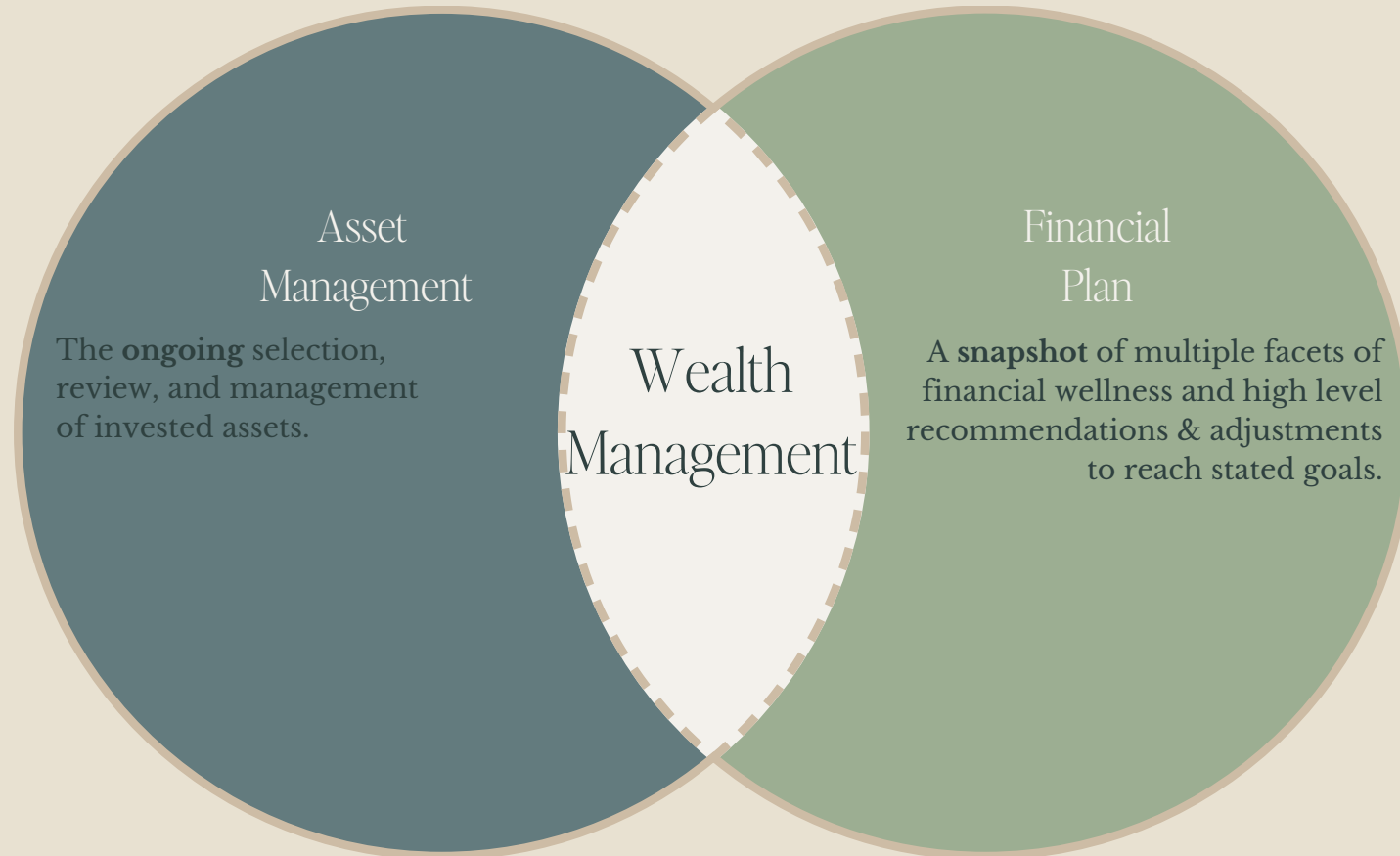




What is Wealth Management?



The **intersection** of Asset Management & Financial Planning. **Ongoing** review and management of **multiple facets** of financial wellness. Advisors help clients work towards stated goals.



What Do I Need To Reach My Goals?

Key Service Components	Asset Management	Financial Plan	Wealth Management
Existing Portfolio Review	✓	✓	✓
Investment Recommendations	✓		✓
Portfolio Rebalancing	✓		✓
Account Funding & Distribution	✓		✓
SS Claiming Strategy		✓	✓
Retirement Spending Est.		✓	✓
Estate Plan Snapshot		✓	✓
Ongoing Estate Plan & Trust Support			✓
Tax Strategy Support			✓
Insurance Snapshot		✓	✓
Ongoing Insurance Support			✓
AND MORE			