



WEALTH MANAGEMENT

ORGANIZE
ANALYZE
PLAN...

WHAT YOU LEAVE BEHIND IS NOT WHAT IS ENGRAVED IN STONE MONUMENTS,
BUT WHAT IS WOVEN INTO THE LIVES OF OTHERS.
- PERICLES



WHO WE ARE

Go confidently in
the direction of
your dreams.
Live the life you
have imagined.

- HENRY DAVID THOREAU

We Are Your Financial Advocate

We take the time to understand what you want out of life – for yourself and for your family.

We employ a comprehensive planning approach combined with sophisticated technology designed to optimize your results and help achieve your financial goals.

We have years of experience collaborating with clients like you. We believe your financial information should be organized, up to date, easy to understand and accessible to you whenever you want, from wherever you are.

We understand that unexpected events and life changes can impact your dreams. We monitor and track your progress every day and adjust your financial plans along the way.

As your financial advocate, your
success is our success.



WHAT WE DO

Our Planning Process Can Help You Achieve Your Financial Dreams

We start by helping you identify your goals and evaluate where you are relative to those goals.

We evaluate your options and recommend strategies to help you get you where you want to be.

We don't stop there. We help you implement the recommendations. Then, we continually monitor your financial situation to ensure you remain on track to achieve your financial dreams.

Your goals remain the centerpiece of our recommendations and strategies.





HOW WE DO IT



We take a comprehensive view of your complete financial picture to develop a deeper understanding of what is required to achieve your goals.



Complete Financial Picture

We link all your financial accounts for a complete and up-to-date view of your financial situation. Our analysis and recommendations are comprehensive and reflect current market conditions.



Monitor Progress

With a daily snapshot of your progress, we can alert and remind you of financial factors that may impact your ability to achieve your goals. This relieves you of organizational burden, allowing you to focus your energies on what matters most in your life.



Increased Collaboration

Our wealth management system provides both you and our team with a secure view of your financial progress. We can collaborate with you online at anytime, no matter where you are.



WHAT WE PROVIDE

We make your life easier by providing unique services for staying organized, updated and prepared.

Personal Financial Website



Organizer

Connect all your accounts for a consolidated view of your entire financial picture.



Budgeting Tools

Set budgets to help reach your savings goals.



Track Spending

Know how much you're spending, and where.



Mobile

A complete financial picture available on your smart phone.



Investments

Interactive charts and detailed views help monitor all your accounts.



Vault

Safely store your most important financial documents, accessible 24/7.



Screen Sharing

Join a screen sharing session quickly and easily for interactive planning anytime, anywhere.



Goals

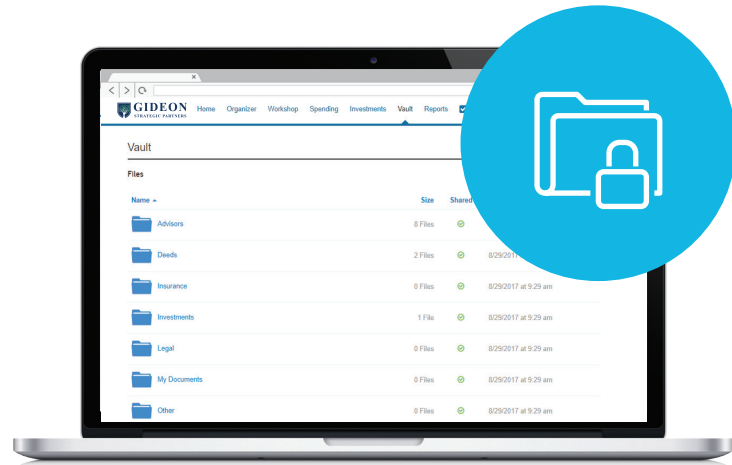
See if you're on target to reach your most important goals.



PROTECT YOUR IMPORTANT DOCUMENTS

Vault Checklist

With unlimited secure document storage, you can organize and protect your most important documents. Review the checklist below and start adding to your Vault today!



LEGAL DOCUMENTS

- Wills
- Deeds
- Revocable & Irrevocable Trusts
- Power of Attorney
- Codicils (Supplements made to a Will)
- Living Wills/Health Directives
- Prenuptial Agreements
- Buy/Sell Agreements
- Contracts

BENEFITS

- Social Security Info
- Veteran's Administration Info
- Employment Benefits

INSURANCE POLICIES

- (Life, LTD, Disability, Medical, Car, Property)

BANK & INVESTMENT STATEMENTS

- Pensions, IRAs, Annuities, etc.
- Investment Accounts
- Stock Options/Certificates

LIABILITIES

- List of Credit Cards with Contact Information
- Mortgages
- Loans

TAXES

- Tax Returns
- W-2 Forms

IDENTIFICATION

- Birth Certificates
- Drivers Licenses
- Passports
- Social Security Cards

FAMILY

- Adoption Papers
- Medical Records
- Marriage License
- Pictures
- Audio Files
- Video Clips

PROPERTY

- Titles to Homes, Autos, Boats, etc.
- Warranties