

The Benefits of Working With an Investment Advisor

What We Deliver as an Investment Advisor

Whether we are helping you plan for your retirement or save for your children's education, YOUR objectives are OUR objectives:

- As an Investment Advisor, it is our fiduciary duty to act in your best interest—we are legally bound to put our clients' interests first
- We will take the time to understand you and your specific financial situation
- We will strive to ensure your needs are being met through a personal relationship and committed pursuit of your investment goals
- We will make portfolio recommendations consistent with your objectives

Personalized, Focused Financial Advice

Our compensation for asset management services is aligned with your goals:

- We charge for our services based on a percentage of your assets managed - It is important to us that your investments continue to grow
- We are required to disclose how we are compensated so you can give consent on financial products where a commission may be involved

Questions You Should Ask Yourself:

1. **What am I looking for - Assistance with buying/selling individual securities, investment advice, or both?**
2. **How do I want to pay my financial professional? Fees? Commissions?**
3. **Do I want to take a longer-term, holistic approach to management of my investments or make it more transaction orientated?**
4. **How important is it that my financial professional have a fiduciary responsibility to put my interests first?**

CONTACT US

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