

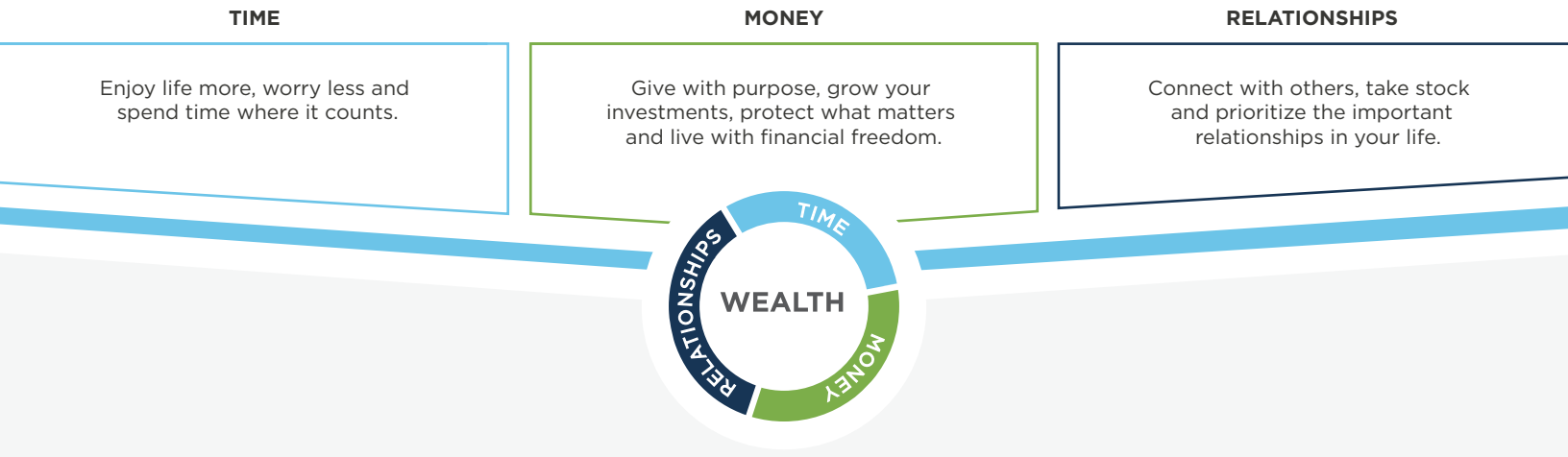
SIGNATURE **FD**

**Are you making the impact
you want with your wealth?**

Impact is something we create, not something we hope for.

IMPACT BY DESIGN™

WE BELIEVE THAT PEOPLE WANT TO MAKE AN IMPACT WITH THEIR WEALTH — THEIR TIME, THEIR MONEY AND THEIR RELATIONSHIPS.



WE SAVE YOU TIME, HELP YOU TAKE CONTROL OF YOUR FINANCIAL LIFE AND BRING FOCUS SO THAT YOU CAN HAVE A BIGGER IMPACT ON WHO AND WHAT IS MOST IMPORTANT TO YOU.

Grow your impact through the lens of financial design, mindset, experiences, community, generosity and growth with our *Impact by Design™* process.



FINANCIAL DESIGN

Design your financial future with confidence by establishing a solid financial foundation.

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| <p>GIVE</p> <p>to the people and causes that are important to you</p> | <p>GROW</p> <p>your investments and income potential</p> | <p>PROTECT</p> <p>your family, lifestyle and property</p> | <p>LIVE</p> <p>with financial freedom by optimizing your cash flow and minimizing taxes</p> |
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MINDSET
Access tools and resources that promote positive thinking and productive, lifelong habits.

EXPERIENCES
Gain the freedom and flexibility to pursue unique experiences, try new things and create memories.

COMMUNITY
Tap into the immense power of community through our client initiatives, from small group gatherings to networking events to service projects.

GENEROSITY
Experience joyful generosity by connecting your passions and resources to meaningful causes in your life.

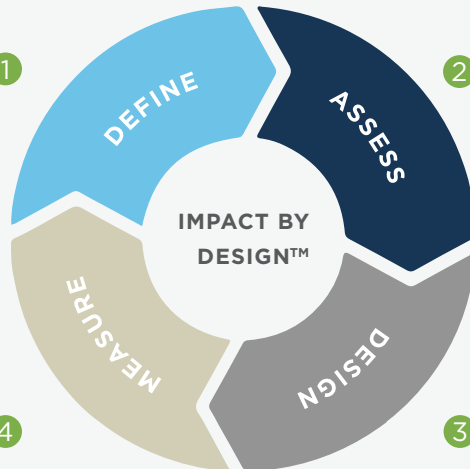
GROWTH
Get inspired, take action, track your progress and achieve your definition of success.

DESIGN YOUR FINANCIAL FUTURE TO MAXIMIZE YOUR IMPACT. THAT'S FINANCIAL DESIGN FOR LIFE.

Gain guidance and customized resources that include a Wealth Blueprint, Wealth Report, Activation Plan and Impact Dashboard.

WEALTH BLUEPRINT

1 Define the vision for your impact with a blueprint that captures your unique purpose and passions across all aspects of your wealth.



WEALTH REPORT

2 Assess where you are and the resources and opportunities available to you.

IMPACT DASHBOARD

4 Measure your impact, track progress toward your goals and celebrate your successes.

ACTIVATION PLAN

3 Design and take action on a detailed plan that outlines the steps you'll take to grow your time, money and relationships.

We power our *Impact by Design™* process by committing our time and talents to provide:



Purpose-Driven Approach

Comprehensive Financial Services

Decision Support

Peak-Performing Advisors

Community & Resources

Objectivity & Transparency



MAXIMIZE YOUR IMPACT BY INVESTING YOUR TIME, MONEY AND RELATIONSHIPS WITH PURPOSE.

**CREATE A LIFE THAT COUNTS INSTEAD
OF SPENDING YOUR LIFE COUNTING.**

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