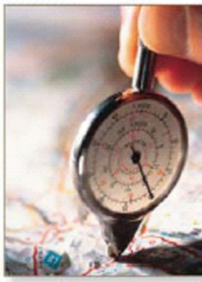
Wealth management process



FINANCIAL PLANNING

We will prepare a customized analysis of your financial situation incorporating your financial goals, risk tolerance and long-range plans.

WILL & ESTATE REVIEW

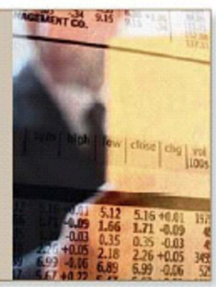
We can help you address your various estate planning concerns and recommend the steps you need to take to achieve your goals.

INSURANCE REVIEW

Our Regional Insurance Specialist can help you protect everything you have worked so hard to build through innovative insurance-based strategies.

INVESTMENT POLICY STATEMENT

The blueprint for the construction of your portfolio, your individualized Investment Policy Statement documents both your financial circumstances and profile as an investor.

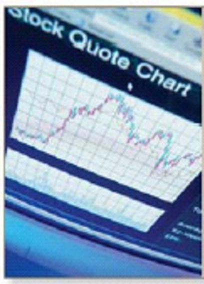


INVESTMENT PROPOSAL

Before implementation, your objectives will be reviewed and we will outline an investment plan created for you. Once approved, the recommendations are put into place.

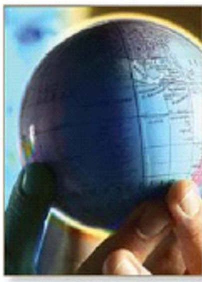
ONGOING SERVICES

You are apprised of the performance of your portfolio and the markets through regular updates, client events, newsletters and our web site.



REGULAR REVIEWS

As your needs and the markets evolve, periodic reviews ensure that your plan remains an effective tool in achieving your objectives.



BRINGING IN THE EXPERTS

Our extensive professional network is at your disposal to assist you in meeting your non-financial needs.