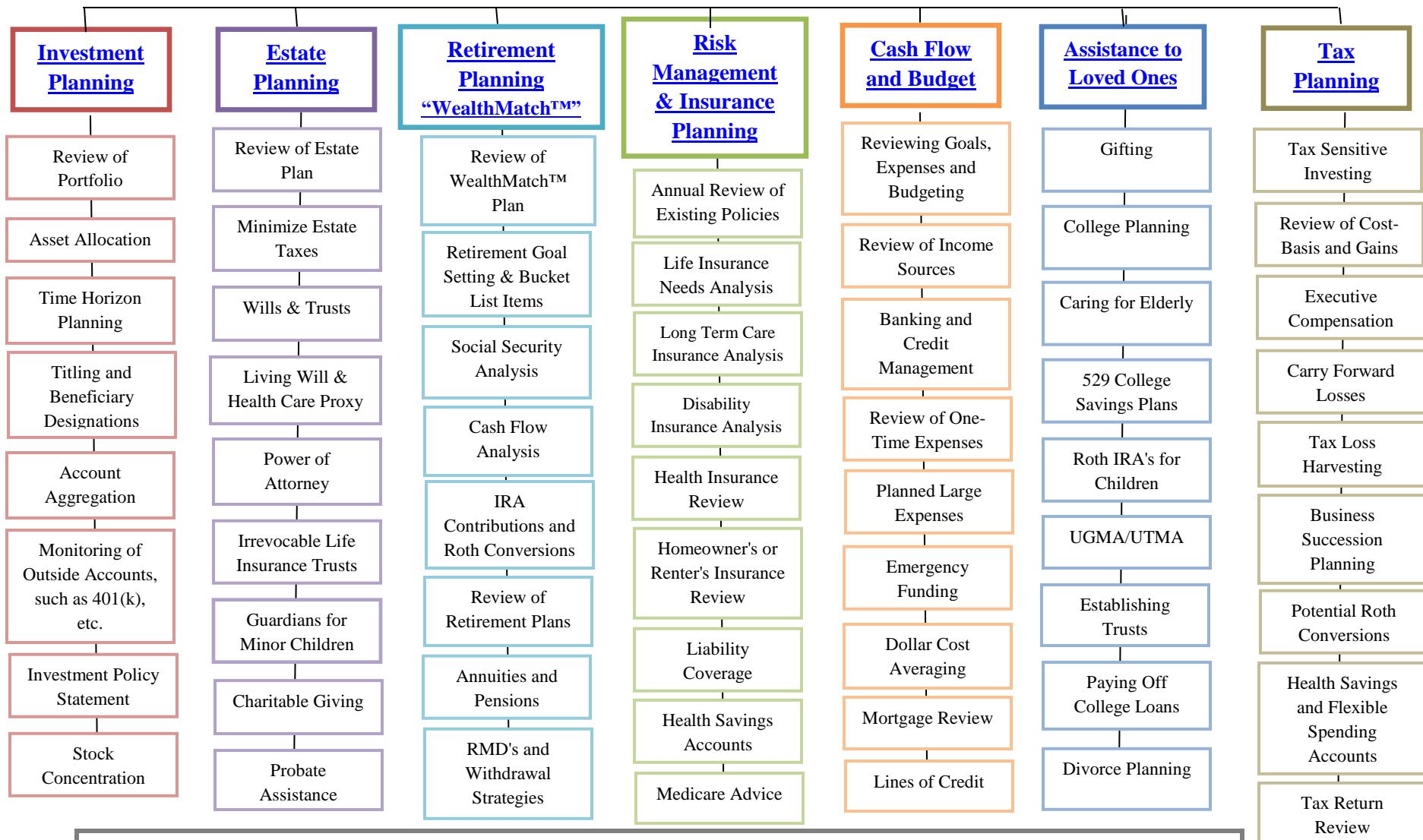


FINANCIAL FUTURE PLANNING CHART™

Services We Offer



In addition to our services listed above, we also:

- Hold regular meetings and ensure that all planning is well coordinated and implemented.
- Planning for incapacity.
- Coordinate with other advisors such as your attorneys and accountants.
- Maintain copies of documents such as insurance policies, estate planning and legal documents, and tax returns.
- Work to ensure that your WealthMatch™ plan is on track to help guide you on your journey toward well-being and prosperity.

None of the information contained herein is meant as tax or legal advice. Please consult the appropriate professional to see how the laws apply to your situation.

Securities offered through LPL Financial, Member FINRA/SIPC. Investment advisory services offered through CWM, LLC a Registered Investment Advisor. LPL Financial is under separate ownership from any other named entity.