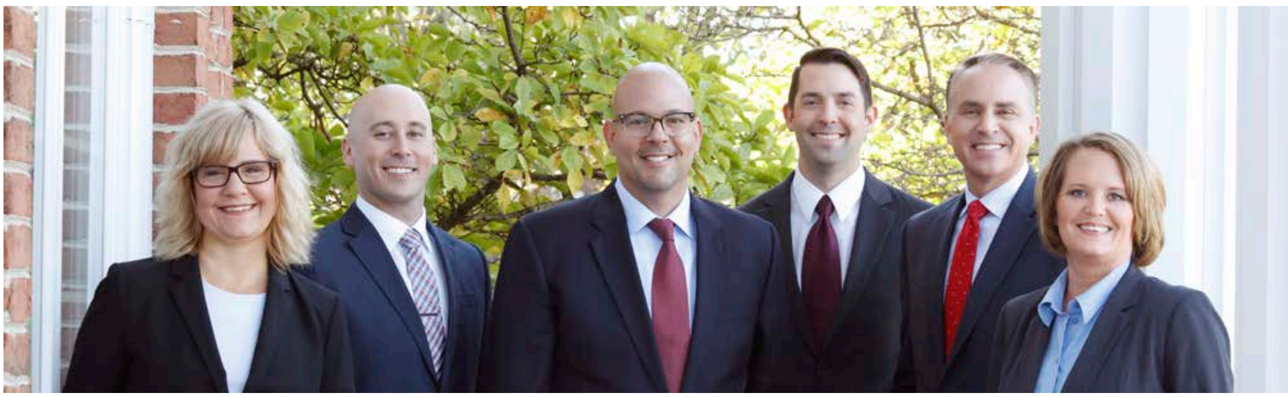
FIDATO WEALTH

COMPREHENSIVE FIDUCIARY ADVICE

Fidato Wealth
Second-Opinion Service

Exclusively For Friends, Family and Colleagues of Our Valued Clients



With the complexities of financial planning, you probably know a friend, family member or colleague who wants to ensure they are making smart decisions with their finances- and putting all of their pieces together in the best way. Or, they might be unhappy with the advice from his or her financial advisor- it's not uncommon. We believe that those who have done a good job saving would value a second opinion on their finances.

In order to help the people you care about achieve their financial goals, we have created a complimentary second-opinion service. We're pleased to offer your friends, family members and colleagues the same expertise and guidance that you have come to expect as a valued client of Fidato Wealth.

Working With a Team That Redefines Wealth Management

As a client of Fidato Wealth, you benefit from a cutting-edge team that has a clear and comprehensive vision of wealth management.

Wealth Management

Investment Management	+	Advanced Planning	+	Relationship Management
• Asset Allocation • Portfolio Management • Manager Due Diligence • Risk Evaluation • Performance Analysis • Threshold Based Rebalancing		• Wealth Enhancement • Wealth Protection • Wealth Transfer • Charitable Giving		• Regularly Scheduled In-Person Progress Meetings • Team of Professionals, Including Certified Financial Planner® Professionals, Investment Advisors, & Legal, Tax, & Insurance Specialists

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Our Consultative Process

We approach each new engagement with a consultative process. This allows us to have an open dialogue in which we learn about every client's values and goals. We work collaboratively with them to tailor a plan to help achieve their goals and values. As a valued client, you will recognize the five steps below as the process you have experienced with us. Through our second-opinion service, your friends, family members and colleagues can enjoy a portion of this experience at no cost.

Full Client Experience

Discovery Meeting	Initial Wealth Management Analysis	Final WM Analysis / Mutual Commitment	WM Strategy Meeting	Regular Progress Meetings

What to Expect From Our Second-Opinion Service

We will meet with your friends, family members and colleagues for a Discovery Meeting. Assuming that they would benefit from a second opinion, they will return for the Initial Wealth Management Analysis Meeting. Their analysis will reveal one of three outcomes:

1. Hopefully, we can confirm they are on track to fulfill their values and achieve their goals with their current financial positioning!
2. If changes are needed and in their best interests, we will suggest areas that should be looked into further, and ways in which we can help.
3. If changes are needed, but we are not the right fit for their needs, we will recommend another provider who is a good fit, or perhaps they can implement changes on their own.

Either way, they will receive a personalized analysis of their current situation that we are confident they will benefit from! We view this as way for your family, friends and colleagues to get a second opinion from a fiduciary!

Second-Opinion Service

Discovery Meeting	Initial Wealth Management Analysis

Let Us Help You Help Those You Care About. Contact Us Today.

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