<table>
<thead>
<tr>
<th>Wealth Management Presentation</th>
<th><img src="image1.jpg" alt="Wealth Management Presentation" /></th>
</tr>
</thead>
<tbody>
<tr>
<td>(Animated Cloud) Social Security, Cash Flow, Savings, Legacy, Mortgage Payments, Banking, Parent’s Needs, Retirement, Charities, Estate Planning, Tuitions, Investments, Debt, Budgeting, Elder Care, Real Estate, Stock Options, Taxes, Career</td>
<td><img src="image2.jpg" alt="Wealth Management Presentation" /></td>
</tr>
<tr>
<td>Quote Inserted –</td>
<td><img src="image3.jpg" alt="Wealth Management Presentation" /></td>
</tr>
<tr>
<td>“Someone is sitting in the shade today, because someone planted a tree a long time ago.” – Warren Buffett</td>
<td><img src="image4.jpg" alt="Wealth Management Presentation" /></td>
</tr>
</tbody>
</table>
Video Launches “What We Do”

Quote Inserted –
“It pays to plan ahead. It wasn’t raining when Noah built the ark.” – Anonymous

1 Identify & Prioritize
- Your Goals
2 Analyze & Evaluate
- Your Assets
3 Strategize & Develop
- A Plan
4 Activate & Implement
- Your Plan
5 Monitor & Adjust
- Your Success

1 Identify & Prioritize Your Goals
- Investments
- Lifestyle
- Education
- Taxes
- Health Care
- Philanthropy
- Retirement
- Protection
- Legacy
- Business
- Parent Care
- Children Needs
(Interactive Goals Slide Widget)

Instructions – Drag and drop your highest priorities to your priority list on the right. Mouse over each priority to see specific facts and statistics on the topic.

Lifestyle –
- People need 60 – 80% of their preretirement income to maintain their present standard of living in retirement.
  *retirementplanner.com

Healthcare –
- Health insurance coverage today is expected to double by 2016
  *medicalnewstoday.com
- Only 46% of health spending is covered by public funds such as Medicare and Medicaid.
  *ncsl.org

Education –
- The average cost of one year at a four-year private college was $30,367.
  *money.cnn.com
- College tuition and fees rose three times as fast as family income.
  *johnboehnar.house.gov

Investments–
- 60% of investors are risk averse to a substantial degree
  *registeredrep.com
- Most investors have never seen their comprehensive asset allocation
  *toolsformoney.com

Retirement–
- 58% of Americans have not calculated how much money they will need for retirement.
  *boston.com/business/
- Those retiring at age 65, can expect to spend 18 to 20 years in the role of retiree.
  *ohioline.osu.edu

Charity–
- 80 percent of wealthy donors contribute
to educational organizations, religious (72%) and health organizations (70%).
*apt11d.com

Taxes-
- 90% of taxes are paid by top 10% wage earnings. 200,000 of income puts you at the top 10%.
*taxfoundation.org

Protection-
- Only 35% of adults have disability insurance
  *affordableinsuranceprotection.com
- Only 27% of adults have Long Term Care Insurance
  *urban.org

Legacy-
- 58% of Americans do not have a will.
  *boston.com/business/
- By the year 2055, $41 trillion will change hands.
  *nptrust.org/

Business-
- 90 percent of U.S. businesses are family owned.
  *cookassociates.com
- Only 30 percent of such companies succeed in the second generation.
  *sbinformation.about.com

Parent Care-
- 30 percent of Boomers anticipate that their parents will move in with them.
  *c-hall.com
- 66 percent Americans believe they will need to provide care to someone in the future.
  *strengthforcaring.com

Children and Grandchildren:
• 40% of Boomers anticipate that their adult children will move back in with them.
  *escapehomes.com
• 6% of all children in the US under age 18 are growing up in grandparent-headed households.
  *tcpnow.com

2 Analyze & Evaluate Your Assets

- Income
- Investment Accounts
- Tax Return
- Real Estate
- Retirement Accounts
- Legal
- Personal Property
- Bank Accounts
- Debt & Liabilities
- Insurance Coverage
- Risk Tolerance
- Business

2 Analyze & Evaluate Your Assets

(Table of Non-Qualified Assets, Retirement Assets, Real Estate & Personal Property)
3 Strategize & Develop
A Plan

- Optimize Your Cash Flow
- Manage Your Investment Portfolios
- Provide Retirement Solutions
- Save for Education
- Protect Your Assets
- Estate Planning
- Determine Fees & Costs

(Interactive Retirement Slide Widget)

Projected Retirement Assets
Below is a retirement projection based on the information you provided.

4 Activate & Implement
Your Plan

- Transition
- Administer
- Implement
- Manage
- Launch
### 5 Monitor & Adjust
Your Success

- See All Your Accounts in one Place
- Access at Anytime, Anywhere
- Daily Update
- Safe Keep Your Documents
- Alerts and Alarms
- Remote Collaboration
- Privacy Protected

### Video Launches “Life in a Box”

### 5 Monitor & Adjust
Your Success

- Organized
- Strategy
- Integrated
- Protection
- Visibility
- Always Up To Date
Quote Inserted –

“Let us go forward together.” – Winston Churchill

(Animated Cloud) Assured, Decisive, Prioritized, Efficiencies, Allocated, Access, Secure, Accountable, Collaborative, Success, Planned, Effective, Designed, Visible, Comprehensive, Mobilized, Attainable, Protected, Coordinated, Organized

YOUR LOGO HERE

Your Company Name
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1-100-100-1000

yourfirstlastaddress.com
www.yourwebsiteaddress.com