# LAT WEALTH
FINANCIAL ADVISORS

TEAM, PROCESS, OUTCOME

At Lat Wealth Financial Advisors, we have reinvented the concept of financial advice.  With your goals as our compass, we strive to take you and your future to the highest level.

At Lat Wealth Financial Advisors, we have customized our services to specifically fit the financial needs of hard-working Americans. We are a full-service comprehensive financial and wealth management firm with a keen focus on helping our clients realize their dreams. We understand how intimidating it can be to work with a large financial group, and we take a personalized approach to help you navigate your financial strategy.

To us, it is vital that we work with you to not only identify your current financial situation, but to anticipate what the future may bring; be it private school, a boat, a beach house... We have a fundamental understanding that planning for the future is all in the details, with a special focus on your career as the most important cornerstone. We take a holistic approach and factor in your company's benefits package to ensure you are maximizing your financial future.

We are committed to providing you with the very best in financial planning and exemplary customer service.

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# The LatWealth Solution

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LatWealth has designed unique ways to enhance your plans to grow your wealth, invest in your future and protect your family. The LatWealth Solution was created with “Hard Working Americans” as the centerpiece of financial success.

No matter the industry, with great companies, come great employees; and in turn - complex benefits.

## THAT IS WHERE WE COME IN

Our LatWealth model was designed to help you maximize your largest opportunity to accumulate assets: your employer. From robust matching 401(k)s to stock options and pensions (yes, some employers still offer pensions), we will explore all avenues to be sure you are getting the highest return from your employer benefits package.
So, whether you need guidance on financial planning, wealth management, insurance, investing, retirement, estate planning or wealth preservation – we are committed to helping you navigate your financial options to ensure achievement of your financial goals.

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# What the LatWealth Solution Means to You

- Improved clarity and control of your financial future
- Profession-driven, tailored advisory approach
- Integrated services tailored for each life stage
- Industry leading financial research and information
- Industry leading technology and consolidated asset reporting platform
- Online client portal for 24/7 information and insights
- Advanced planning tools and resources
- Expanded network access to individualized services

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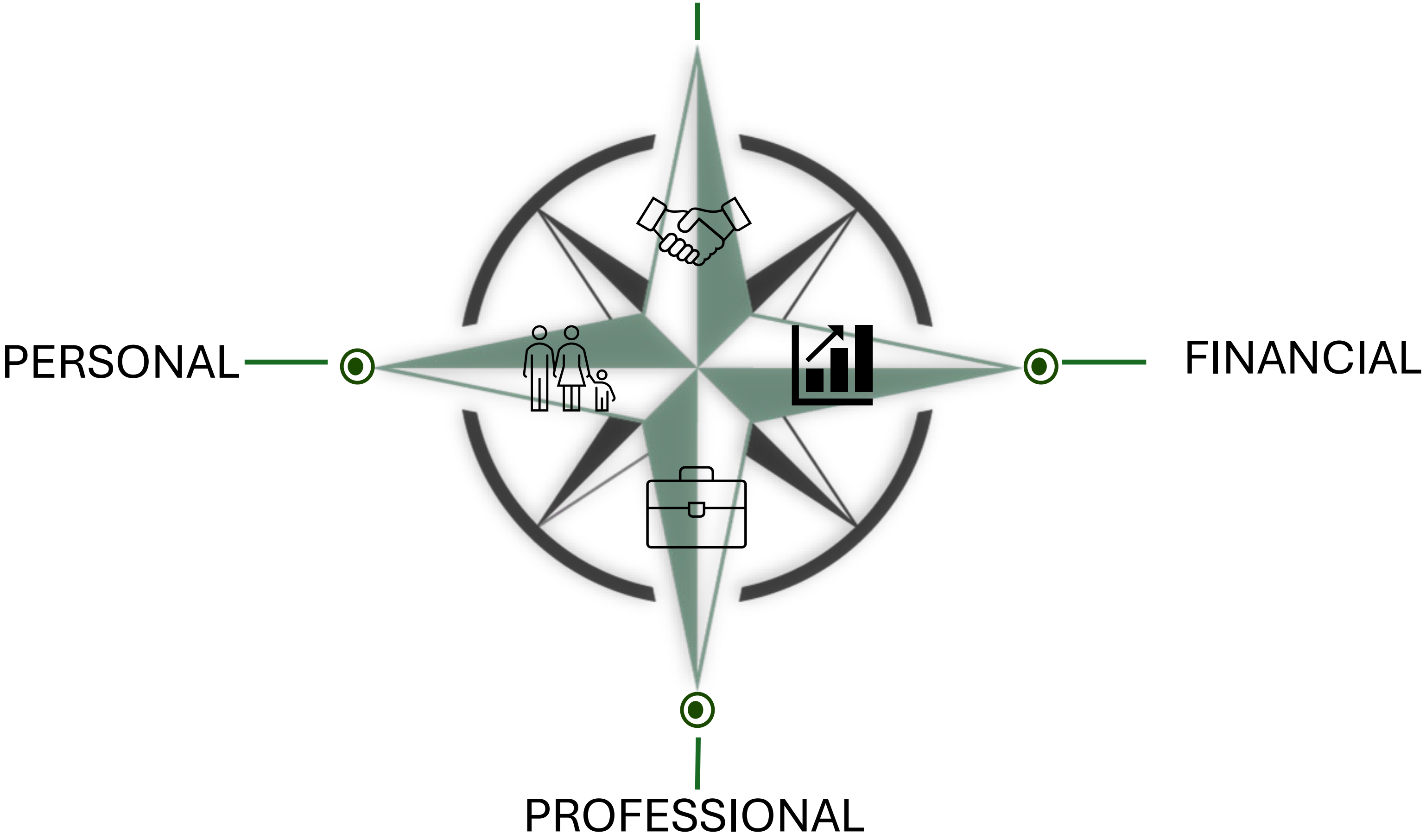
# How the LatWealth Solution Works

The **LatWealth Solution** was created with one thing in mind. YOU.
The unique approach incorporates your personal goals, financial goals and equally important, your career goals. In a complex world of finance, having a process to ensure efficiency is critical to building wealth.

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PERSONAL

## LIFESTYLE
Fixed spending analysis
Discretionary spending analysis
Risk tolerance profile
Lifestyle goals

## FAMILY
Life insurance strategies
Income protection
College planning
Trust establishment
Estate planning

## RETIREMENT
Goal analysis
Lifestyle planning
Succession planning strategies

## UNEXPECTED
Disability
Identity theft solutions
Long-term care planning
Family hardships

PROFESSIONAL

## CAREER
Anticipated financial path
Industry growth trends
Compensation sources
Equity opportunities

## BENEFITS
401(k)
Health plan considerations
Comprehensive insurance options
Deferred compensation strategies
Stock option strategies

## RISK PREVENTION
High-risk promotions and travel
Cash reserve layering

## INVESTMENTS
Access to capital for entrepreneurial ventures
Strategic partner deals
Participation in capital markets

FINANCIAL

## TOOLS
Advanced Investments
Strategy reporting and analysis
Clients access to online accounts
Financial calculators

## EXPERTISE
Advisors with industry certification diverse experience
Globel research and insights
Broad client scenario expertise

## TRENDS
Short-term trend strategies
Alternative financial products and services
Long-term hedge strategies

## OPPORTUNITIES
Emerging markets
Unique valuations
Industry/sector risk analysis

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# Our Services

Our industry-certified advisors work closely with you to identify your needs within each of the following categories

## FINANCIAL PLANNING

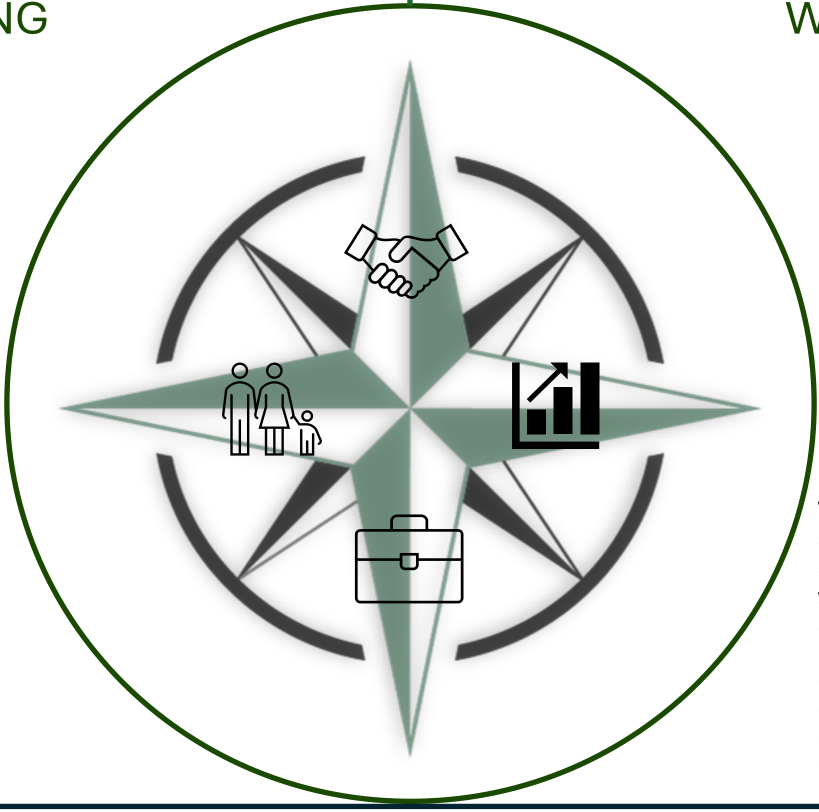
Our path to financial success begins with understanding your unique needs and goals.

- 401(k) Strategies
- Retirement Planning
- Tax & Insurance Strategies
- Employer Benefits Optimization
- Education Planning
- Estate Planning

## BUSINESS OWNER SERVICES

Whether you're a doctor or lawyer with your own practice, an entrepreneur with a growing company or the CEO and founder of a large company, running a business presents very specific financial needs and requirements.

- Owner and Executive Compensation Plans
- Qualified Retirement Plans
- Key Employee Retention Plans
- Business Succession Planning



## WEALTH MANAGEMENT

We offer a wide range of specialized services to help you grow and manage your wealth.

- Investment Advisory Services
- Tax Sensitive Investment Management
- Investment Income Strategies
- Alternative Income Strategies
- Specialized Separately Managed Account Access

## ADVANCED TAX & INSURANCE STRATEGIES

We know that complex financial challenges require advanced solutions. That's why our team is armed with strategies to meet tax and insurance needs to help allow your investments to continue to grow. When engaged to do so, we can provide:.

- Advanced Tax Strategies
- Actuarial Plan design
- Advanced Insurance Architecture
- Advanced Estate Strategies

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LatWealth – We help clients align wealth with their values and intentions.

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