



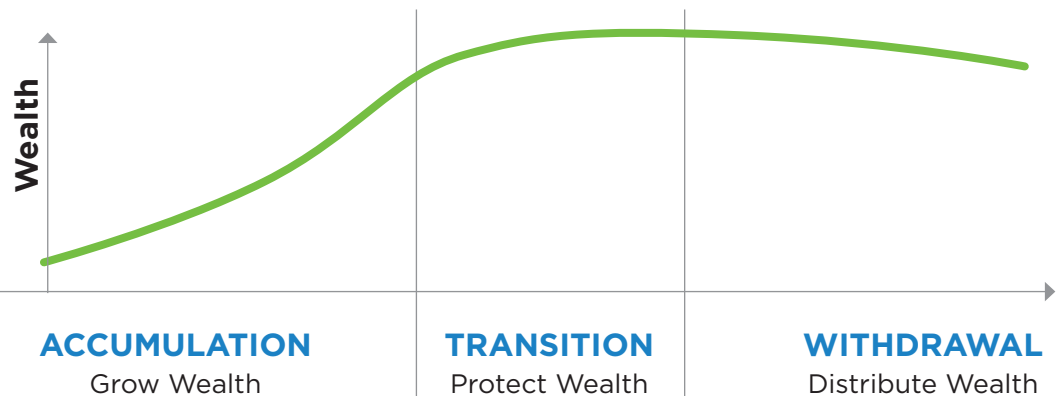
UNDIVIDED INVESTMENT PLAN

Money is not a goal in and of itself. Money is a tool to help you achieve **“What’s Most Important to You”**. *Goals-Based Investment Planning* is the process of matching your goals, objectives and dreams with your money and financial resources in light of the risks and rewards presented by current economic and financial markets. We want to understand and consider:

- Your goals, objectives and dreams (*What’s Most Important to You*)
- Your current stage of Investment (*See below*)
- The money, financial resources and investment returns required to achieve your goals
- Time horizon for your various goals (*today’s needs or long into the future*)
- How much and what kinds of risk you are willing and able to endure
- Income and liquidity needs

Align your portfolio with your goals and investment stage

Each investor is typically in one of the following stages of investment. Investors face very different risks and rewards in each of these stages.



Investment Stage
Key Objective

ACCUMULATION
Grow Wealth

TRANSITION
Protect Wealth

WITHDRAWAL
Distribute Wealth

Investment planning designed to achieve your personal financial and life goals

Our team brings over 80 years of investment and financial experience to our clients, and holds the designations of CFA, CFP®, CPA, and MBA. We have access to extensive investment research, risk mitigation tools and investment industry partners.

Would you like to know?

- Why asset allocation and diversification are important to your portfolio
- How much investment “risk” you are currently facing
- How your investments could perform under several economic scenarios like the “Crash of 2008”
- How your asset allocation compares to industry models

Ask us for a second opinion using industry leading investment portfolio and analysis tools.

Life Plan + Financial Plan + Investment Plan = Undivided Plan

Start your Undivided Plan by visiting www.undividedwealth.com