Financial Solutions Advisory Group

A Registered Investment Advisory Firm

Building Wealth, Investing in Relationships

BUILDING WEALTH, INVESTING IN RELATIONSHIPS

At Financial Solutions Advisory Group, we provide customized wealth management and financial planning through highly personalized service. Our team has decades of experience working with affluent individuals and their families, and we have devoted our careers to addressing our clients' complex financial needs.

Our breadth of knowledge, experience and resources are dedicated to a single purpose: *to help you achieve your life's objectives*.

WE ARE: FEE-ONLY, FIDUCIARY, AND INDEPENDENT.

Why Choose Financial Solutions? (VIDEO)

AGENDA

1 **Our comprehensive resources for complex wealth**
A team of specialists committed to serving your best interests

2 **An investment process designed to help you reach your goals**
Our approach to customizing a portfolio that addresses your unique objectives

3 **A full range of wealth management services**
Coordinating your financial care to simplify your life

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1 OUR COMPREHENSIVE RESOURCES FOR COMPLEX WEALTH

A team of specialists committed to serving your best interests

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MEET THE TEAM

Beckman, Marie
PARTNER
WEALTH MANAGER
CLIENT RELATIONSHIP SPECIALIST

Bennington, Doug, CFA
PARTNER
WEALTH MANAGER
CLIENT RELATIONSHIP SPECIALIST

Gunn, Alan CTFA
PARTNER
CLIENT RELATIONSHIP SPECIALIST

Jurczyk, Scot CFA
PARTNER
WEALTH MANAGER
LEAD PARTNER OF INVESTMENTS

Jutovsky, David CPA, PFS
PARTNER
WEALTH MANAGER
CLIENT RELATIONSHIP SPECIALIST

Munkvold, Scott CFP®
PARTNER
WEALTH MANAGER
LEAD PARTNER OF FINANCIAL PLANNING

Rawleigh, Chad CFA
PARTNER
WEALTH MANAGER
CLIENT RELATIONSHIP SPECIALIST

Soehn, Mark
PARTNER
WEALTH MANAGER
LEAD PARTNER OF CLIENT ENGAGEMENT

Varner, Matt, CFP®, CPA
WEALTH MANAGER
CLIENT RELATIONSHIP SPECIALIST

Weinmann, Jeff
OPERATIONS MANAGER

OUR CLIENT COMMITMENT

We have structured our firm in a way that puts our clients' best interests at the forefront.

FEE-ONLY ADVICE

As a fee-only advisor, we do not accept compensation from any party other than you, so we will never open the door to any conflict of interest.

LOW CLIENT-TO-ADVISOR RATIO

We restrict the number of clients we accept in order to ensure better investment oversight and personalized service, and you will enjoy direct access to our firm's owners.

OPEN-ARCHITECTURE INVESTMENT PLATFORM

We are free to choose the best analysts, managers and solutions to serve your unique investment needs.

CLIENT

FULLY INDEPENDENT

We are not beholden to any corporate agenda—our focus is your success.

REGISTERED INVESTMENT ADVISOR (RIA)

Our SEC registration means that we have a legal fiduciary obligation to act in your best interests.

2 AN INVESTMENT PROCESS DESIGNED TO HELP YOU REACH YOUR GOALS

Our approach to customizing a portfolio that addresses your unique objectives

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OUR PROCESS

1 DISCOVER

- Understand your financial goals, challenges and preferences
- Gather documentation
- Open dialogues with your accountant and attorney if required

2 PROPOSE

- Develop a personalized financial plan
- Design an investment portfolio
- Create a schedule for briefings and reviews

3 IMPLEMENT

- Initiate your financial plan
- Phase in the investment recommendations
- Enroll in selected services
- Review forthcoming client statements

4 MONITOR

- Evaluate your progress according to the plan
- Adjust the plan and investments when needed
- Inform you, your accountant and your attorney of notable developments
- Help you navigate timely options and opportunities

OUR APPROACH

FEE-ONLY

FIDUCIARY

INDEPENDENT

LEADING EDGE TECHNOLOGY

PERSONAL RELATIONSHIPS

DIVERSIFICATION

TAX MINIMIZATION

LONG-TERM PERSPECTIVE

ACCESS TO INSTITUTIONAL MARKETPLACE

RISK MANAGEMENT

OUR PHILOSOPHY

At Financial Solutions, we build personalized, long-term allocations using a disciplined approach that integrates both passive and active investing. We believe in constructing portfolios that balance risk and return, using a mix of investment vehicles, including: Mutual funds, Exchange-traded funds (ETFs), and Individual securities.

APPROACH

We focus on risk-adjusted returns by combining long-term strategic asset allocation with tactical opportunities in the short-term.

CORE PRINCIPLES

1. Diversification – Allocating investments across asset classes to manage risk and enhance stability.
2. Long-Term Focus with Tactical Adjustments – Prioritizing sustainable growth while taking advantage of short-term opportunities.
3. Risk & Return Balance – Managing portfolios to align with individual risk tolerance while seeking risk-adjusted returns.
4. Rebalancing – Periodically adjusting allocations to maintain strategic targets.
5. Cost Efficiency – Minimizing fees to enhance net returns.
6. Tax Efficiency – Implementing strategies to reduce tax liabilities and improve after-tax performance.
7. Discipline & Patience – Avoiding emotional decisions and adhering to a structured investment plan.
8. Dollar-Cost Averaging – Investing consistently to reduce the impact of market volatility.

3 A FULL RANGE OF WEALTH MANAGEMENT SERVICES

Coordinating your financial care to simplify your life

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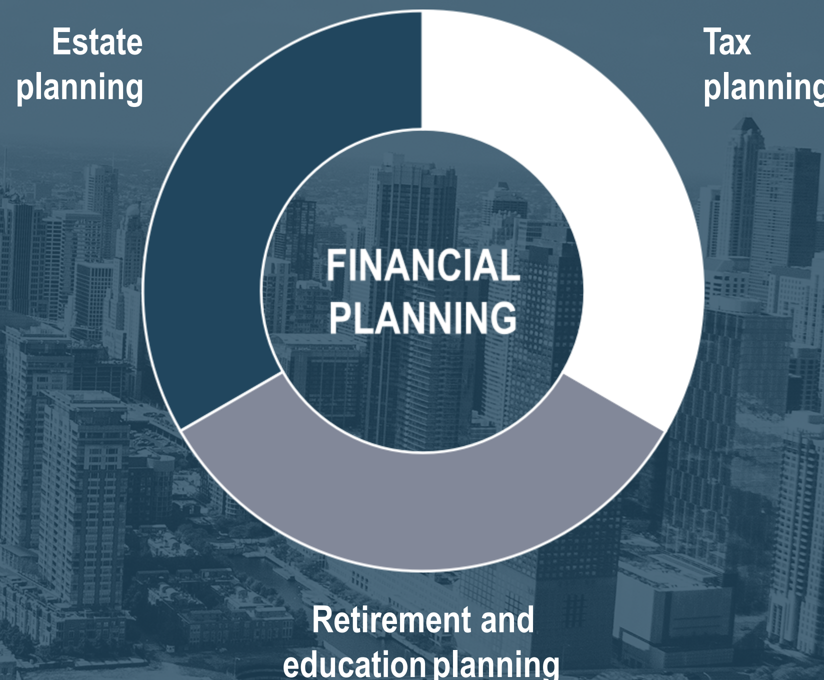
OUR SERVICES

COMPREHENSIVE FINANCIAL PLANNING

A good financial plan is more than a set of steps for reaching your goal. It's a practical tool that helps ensure your consistent progress through guidelines and benchmarks.

Our plans take every aspect of your financial life into account, from the optimal management of income and debt to proper insurance coverage. And our advice is as unique as you are.

You will receive guidance that's based not only in deep experience and unparalleled expertise but, most importantly, on our unwavering commitment to put your interests first.

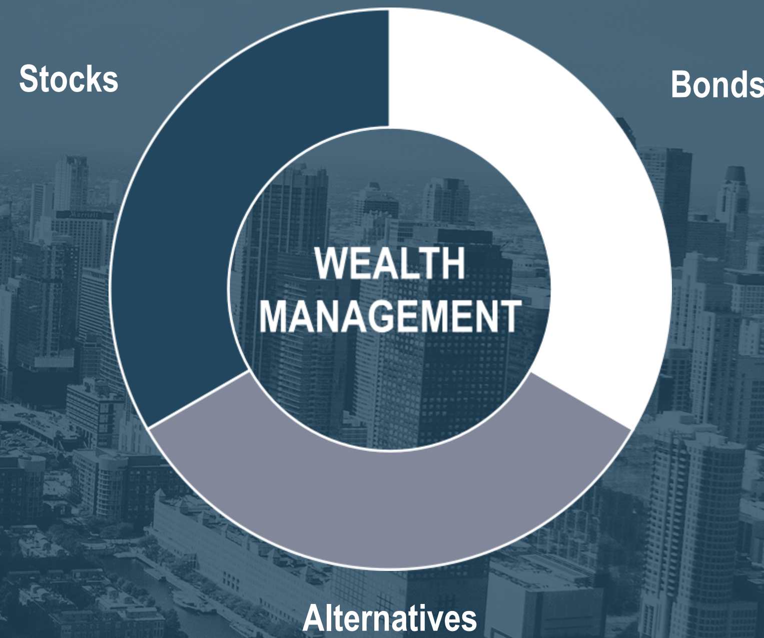


OUR SERVICES

WEALTH MANAGEMENT

We use a disciplined process to customize investment portfolios for your unique goals, needs and tolerance for risk. Our approach features a core equity portfolio in which we seek to limit risk as well as management fees and taxes.

Our strategy for enhanced returns involves dedicating a portion of assets to actively managed and alternative asset classes. We believe that carefully diversifying portfolios among asset classes, managers and investment strategies is the most reliable way to meet clients' individual goals.



CONTACT US

Find out how we can give you financial guidance based on decades of knowledge and a commitment to putting your interests first—so you can pursue your life's goals with confidence. Contact us today to get started.

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