

FINANCIAL DESIGN FOR

LIFE

More than just wealth management, more than just financial advice. SignatureFD designs a personalized, comprehensive wealth strategy for you that is as unique as your own signature, empowering you to use your wealth to live a great life.

SIGNATUREFD

There is a constant balancing act between living for today and preparing for tomorrow. At SignatureFD, our goal is to empower you to use your wealth to live a great life.

HOW DO YOU DEFINE WEALTH

Wealth means different things to different people. Webster's defines wealth as "a great quantity or store of money, valuable possessions, property, or other riches". It is hard to argue with that definition, which is why so much of traditional wealth management focuses on just that. Accumulating, saving, and investing for the future; protecting you and your family from potential risks; and making sure your estate plan is in order. And these are very important things.

However, we believe that wealth is much more than just, well, wealth. That wealth is only significant to the extent it allows you to enjoy what is important to you. Likewise, wealth management is more than just managing wealth. It is about life and enabling you to live life to its fullest.

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DESIGN (dǎ' zīn) n.

1. A plan or drawing produced to show the look or function of something before it is built or made.
2. Purpose, planning, or intention that exists or is thought to exist behind an action, fact, or material object.

DESIGNING A GREAT LIFE

At SignatureFD, we enable you to live the life you dream of by designing and executing an innovative and comprehensive wealth program to achieve your life goals. Our belief is that any plan must start with life as the central focus and then move outward to the solutions that fit your specific needs.

We have found that you have to decide what is important before deciding what to do. And that is exactly what we will help you do. Through our Wealth Blueprint process, our experienced team helps you discover your life goals, identify how best to employ your wealth to achieve those goals, and implement strategies for your success.

We are passionate about delivering exceptional advice, planning and service to provide you with the financial peace of mind necessary to allow you to live confidently, fully, and purposefully.

SIGNATURE **FD**

CONFIDENTLY (kanfəd(ə)ntli) adv.
1. Acting on the feeling or belief that one can rely on someone or something; with firm trust.
2. Acting on feeling certain about the truth of something.

LIVE CONFIDENTLY

Your wealth represents security. Protection against the unknown. And in life, it is fear of that unknown that robs our faith and confidence, driving us to be reactive instead of proactive. How do we overcome that? By being prepared.

At SignatureFD, we believe that every financial design starts with life as the foundation. So while we work with you to assemble your complete financial picture and address your most pressing issues, we are also working with you to discover your life values, vision, and goals.

We believe that when we work together to understand what is important to you, where you want to go in life, what you want to accomplish, and how your history, attitudes, and beliefs influence your decision making, we can design unique financial strategies to enable you to successfully achieve those goals.

Confidence is based on your attitude and beliefs. Therefore, being prepared and knowing that your financial wealth is secure and working to get you where you want to be provides you the ability to live confidently in the face of the unknown.

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FULLY (ˈfoʊl̩ē) adv.

1. Completely or entirely; to the furthest extent.
2. Without lacking or omitting anything.

LIVE FULLY

Your wealth represents freedom. The freedom to focus on what really matters to you: your well-being, relationships, experiences, and dreams. Without that freedom, life is driven by what you have to do rather than what you want to do.

At SignatureFD, we believe that by designing a wealth program around your life's values, visions, and goals, we can enable you to live a fully satisfying life.

A life where you grow your experiences, your achievements, your talents, your character, and your memories. A life where you realize that wealth is so much more than just financial. A life--on your own terms.

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PURPOSEFULLY (ˈpərpəsʃəleɪ) adv.

1. Acting with reason and intent.
2. Acting with determination.

LIVE

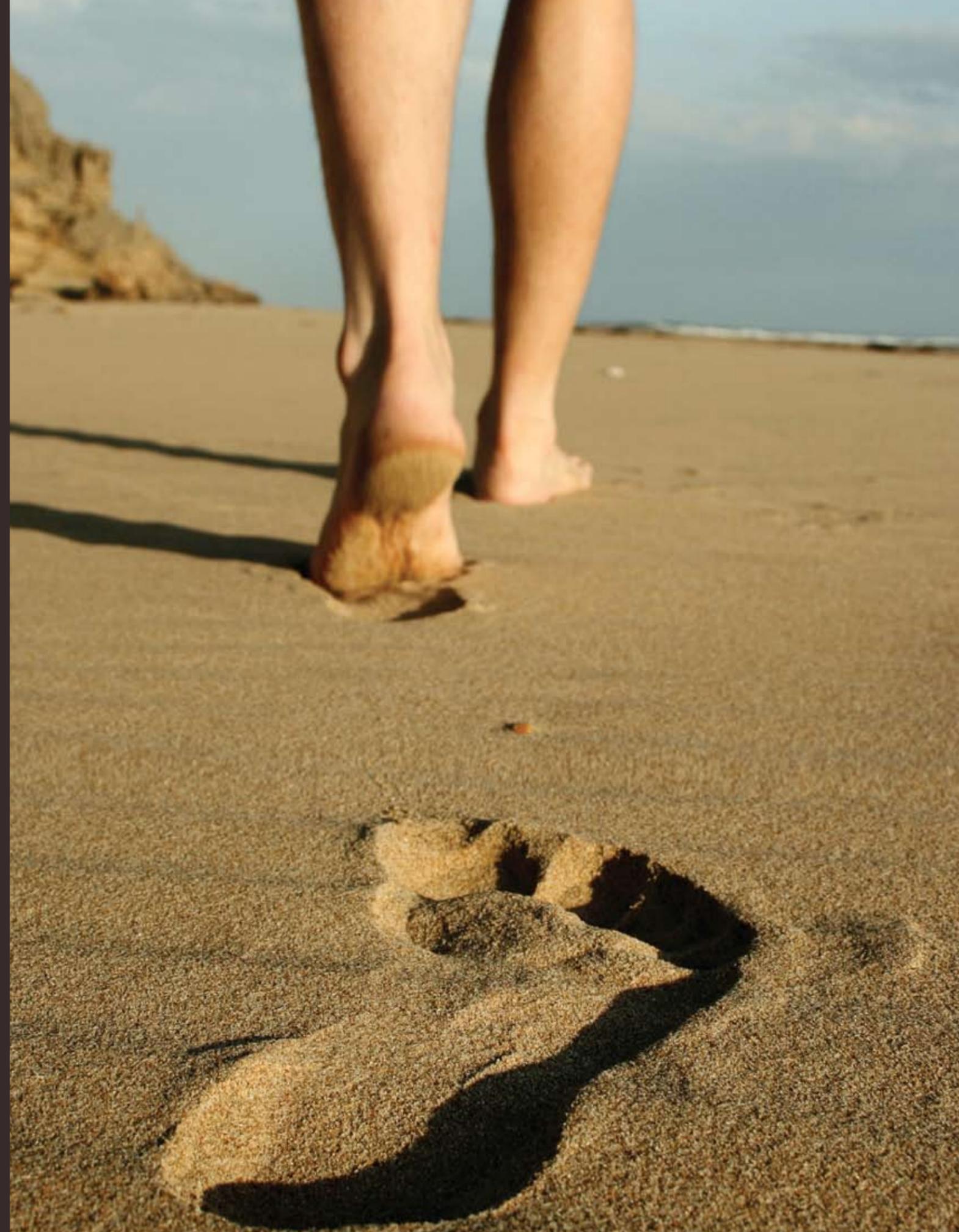
PURPOSEFULLY

Your wealth represents opportunity and responsibility. And defining the purpose of your wealth provides your life both balance and direction by examining what is most important and knowing how the decisions you make will impact you now and in the future.

At SignatureFD, we believe that when you are confident in your financial future and free to determine what is truly most important in your life, you can prioritize accordingly. You become empowered to live your life with purpose, using your wealth--be it money, time, talents, wisdom, health, influence, or relationships--to make a positive difference in the lives of your family, friends, community, and society.

While your wealth may be a reflection of your success, it is what you do with it that makes it significant and fulfills your life.

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