SIGNATUREFD

Financial Design for Life

FIRM OVERVIEW

Security, Freedom, Opportunity

SIGNATUREFD AT A GLANCE

OUR SERVICES

Comprehensive wealth management, including cash flow, debt and taxes, asset management, asset protection and wealth transfer

OUR CLIENTS

More than $2 billion of assets under advisement

Average client assets of more than $3 million

Client retention rate of 97% since opening our doors in 1997*

OUR TEAM

More than 40 team members, including Certified Financial Planner™ professionals, Chartered Financial Analysts, Certified Public Accountants and J.D.s

Fiduciary advisors who put their client's best interest first

OUR SOLUTIONS

Discretionary asset management implemented with specialist managers

Investment solutions include mutual funds, ETFs, separately managed accounts and alternative investments

Full range of retirement plan solutions

Custodians include Schwab, Fidelity, Pershing and TD Ameritrade

Trust solutions through Schwab Trust, Fidelity Trust and Bank of New York

Licensed insurance agency (life, disability, long-term-care, annuities, property and casualty insurance)

OUR FEES

Fee-only wealth management, financial planning and investment management services

Insurance products are fee or commission based on product type

FINANCIAL DESIGN FROM SIGNATUREFD

SignatureFD is an innovative and comprehensive financial design firm with a simple mission: To empower each client to use their wealth to live a great life. Since 1997, we have provided financial planning and investment advice to high-net-worth families (and related entities), retirement plans and non-profit organizations.

With SignatureFD, we created a professional services firm that provides holistic advice and solutions in the best interest of our clients. Our expert investment professionals, financial planners, tax experts and consultants work as a team to manage and oversee your financial well-being.

Our goal is to help you simplify your financial life, save you time, secure your future and reduce your risks. We are committed to being there for you when you need us, partnering with the best service providers in the market, working together to design a blueprint that reflects your goals, and executing strategies that allow you to see real progress toward those goals.

OUR GOAL IS TO HELP YOU SIMPLIFY YOUR FINANCIAL LIFE, SAVE YOU TIME, SECURE YOUR FUTURE AND REDUCE YOUR RISKS.

THE SIGNATUREFD BLUEPRINT

MISSION: To empower our clients and our people to use their wealth to live a great life.

VISION: To be the most well-respected independent financial design firm wherever we serve.

VALUES: Achievement, balance, commitment, integrity, passion for excellence and stewardship.

PHILOSOPHY: We help people achieve their most important goals. We are wealth managers, not just portfolio managers. We manage the total financial picture to provide our clients with the financial peace of mind necessary to allow them to live confidently, fully and purposefully.

CULTURE: Our goal is to foster a culture that supports greatness—where empowered team members have the opportunity to do what they do best every day. We strive to train, support and compensate our people to help clients succeed.

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OUR PLEDGE TO YOU

At SignatureFD, we have a simple mission: to empower you to use your wealth to live a great life. To do that, we believe we must measure success against your life goals, not just against an arbitrary number. We are committed to using our time and talents to help you discover your life goals, identify how best to employ your wealth to achieve those goals and implement strategies for success.

WE ARE COMMITTED TO YOUR SUCCESS

We use your success to measure our own. We will be there for you when you need us, to help you and your family achieve and maintain financial security. We develop long-term relationships with our clients based on trust. Our role is to work with you to design a blueprint that reflects what is important to you and where you would like to be in the future. We then implement the necessary steps and respond to the inevitable changes that will occur over time. We will be proactive in our relationship with you so you will see real progress towards your goals and be confident in the steps being taken.

WE ARE FOCUSED ON YOUR NEEDS

We will focus on the issues affecting wealthy individuals and families and take on a limited number of clients to ensure that you will receive an extraordinary service experience.

WE ARE INDEPENDENT AND OBJECTIVE

As fiduciaries, we will put your best interest first. We will always operate independently to align ourselves with the best service providers available. We will be transparent, disclosing our fees and potential conflicts of interest. We hold ourselves to the highest standards of honesty, character and loyalty.

WE WILL MAINTAIN A COMPREHENSIVE APPROACH TO YOUR WEALTH

We will base our services on a 360-degree view of your financial situation. Once we understand your unique goals and values, we will provide customized and integrated strategies for wealth accumulation, wealth preservation and wealth transfer.

WE WILL STAY TRUE TO OUR INVESTMENT APPROACH

We will maintain our three-fold investment focus: maximizing your returns, minimizing your taxes and expenses, and controlling your risk through proper diversification. We offer customized solutions via a disciplined philosophy and approach. We will add value through tactical asset allocation strategies and careful selection and monitoring of money managers.

WE WILL MAINTAIN OUR PASSION FOR EXCELLENCE

We will continue to push ourselves to increase our expertise and exceed your expectations. Our team is made up of experts in each of the wealth management disciplines and we have extensive experience serving a very sophisticated clientele. Many of our senior relationship managers also hold advanced degrees and/or multiple professional designations.

LIVE CONFIDENTLY. LIVE FULLY. LIVE PURPOSEFULLY.

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