



SIGNATURE**FD**

*Financial Design for Life*

WOMEN'S INITIATIVE

# Signature**WOMEN**

**LIVE CONFIDENTLY KNOWING YOU ARE IN CONTROL**

## **SIGNATURE**FD** DIFFERENCE**

### **INVESTED IN YOU**

We take the time to know you as an individual. We listen to your goals and concerns, partnering with you to create a plan to help you achieve financial peace of mind.

### **A DEDICATED TEAM**

Our advisors have a passion for serving women and take pride in delivering exceptional advice, planning and service. We are competent, credentialed and caring advisors who are committed to your success.

### **EMPOWERING YOUR FINANCIAL LIFE**

We know that you are a strong, intelligent and independent woman. We also know that you have questions. Our tools and educational opportunities help you make wise financial decisions at your own pace.

### **ATTENTIVE COMMUNICATION**

We provide personal and easy-to-understand advice in an objective and pressure-free setting. By listening more and talking less, we help women find their own answers.

### **A THRIVING COMMUNITY**

We nurture a thriving, evolving and supportive community where you can connect with like-minded women who share similar experiences.

Managing your wealth is more than just managing your money. It involves understanding your values, vision and goals, and then making decisions that enable you to live a fully satisfying life—a life where you grow your experiences, memories and achievements while making a difference in the lives of others. A life where you realize that wealth is so much more than just financial. A life, on your own terms.

To reach your goals, you need the support of people who inspire and encourage you to make the most of your life. With Signature**WOMEN**, Signature**FD**'s women's initiative, we offer financial services designed to help women take control of their finances to achieve clarity and confidence. Our mission is to empower women to use their wealth to live a great life.

**EVERY WOMAN DESERVES TO WORK WITH  
AN ADVISOR WHO IS COMMITTED TO  
UNDERSTANDING HER NEEDS AND HELPING  
HER DESIGN THE LIFE SHE DESIRES.**

### **WHY A WOMEN'S INITIATIVE?**

Women have unique financial needs. But for too long, the financial services community has ignored women's concerns about wealth management. At Signature**FD**, we have listened to the concerns of our female clients. We've taken what we've learned from those conversations and developed a unique approach that will help women build and grow their wealth, creating a comprehensive wealth program that covers every aspect of their financial lives.

We partner with women who want to take control of their wealth, including women in transition (e.g., divorcees, widows and those preparing for retirement) as well as entrepreneurs and professionals who want to take a more active role in their finances. By becoming a part of the Signature**WOMEN** community, you'll be able to connect with others, learn more about financial issues and become even more empowered in managing your financial future.

## WHAT WE DO

When a woman decides to take control of her financial life, we are here to help. From an active corporate executive to a mother managing a demanding family schedule, time is a valuable commodity. Our Wealth Blueprint Process helps simplify your financial life, save time, secure your future and reduce your risks, providing you peace of mind and comfort so you can live a great life. Our solutions address some of the major challenges that women face when managing their wealth.

## CREATING A VISION FOR YOUR FUTURE

Your wealth represents security, freedom, opportunity and responsibility. What do you hope to achieve with all that you have? First, you have to decide what is most important to you, and we can help you do that. As we work together to create your Wealth Blueprint, a clear vision for your future will emerge, as well as a path for getting there.

## MANAGING YOUR WEALTH TODAY

A financial design for your life begins with where you are today. We start with analysis, obtaining a clear financial picture and assessing risks. By looking at your cash flow, debt, benefits, education funding, taxes and more, we can offer detailed advice to help you achieve lasting financial security. Our focus is on helping you achieve your goals by maximizing your returns, minimizing taxes and expenses, and mitigating risk.

## COPING WITH TRANSITION

Life changes can bring new responsibilities as well as stress. We guide you through life's transitions, whether you're getting married, starting a family, getting divorced, recently widowed, receiving an inheritance, establishing or selling a business, or approaching retirement. This signature service helps create stability and comfort. We listen, educate and communicate, providing strategies that are sensitive to the feelings of women in transition.

## PROTECTING YOUR WEALTH

Part of managing your wealth involves protecting your assets and preparing for the unexpected. SignatureFD's advisors analyze the unique risks that threaten you, your family and your wealth. We provide asset protection consulting, assistance with eldercare planning, and risk management and insurance services. We then incorporate these strategies into your wealth program to ensure you and your loved ones are protected.

## DESIGNING A LEGACY

Eventually, we each must decide how we want our wealth to impact our family, our community and our society. Our comprehensive wealth transfer services ensure that you leave a mark as unique as your signature, passing on what matters most: your wisdom, values, traditions, beliefs and memories, in addition to your financial assets and prized possessions. We guide you in crafting a plan that articulates your wishes, protects your family, minimizes taxes and preserves your legacy for future generations.

# SIGNATUREFD

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Different types of investments involve varying degrees of risk. Therefore, it should not be assumed that future performance of any specific investment or investment strategy (including the investments and/or investment strategies recommended and/or undertaken by SignatureFD) or any investment-related or financial planning consulting services, will be profitable, equal any corresponding indicated historical performance level(s), or prove successful. All services are dependent on the client's specific needs and situation, and it remains the client's responsibility to inform SignatureFD if there are any changes in the client's personal/financial situation or investment objectives. A copy of SignatureFD's current written disclosure statement discussing its advisory services and fees is available upon request.