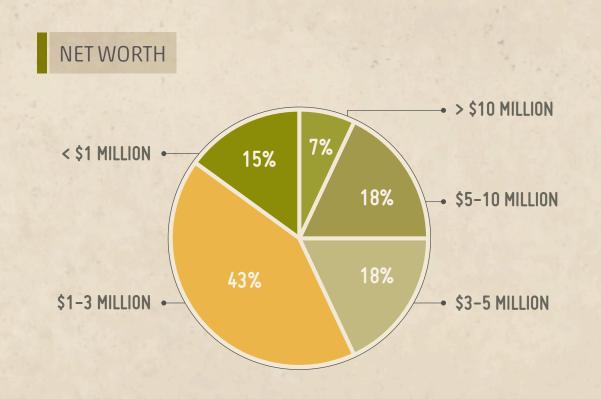
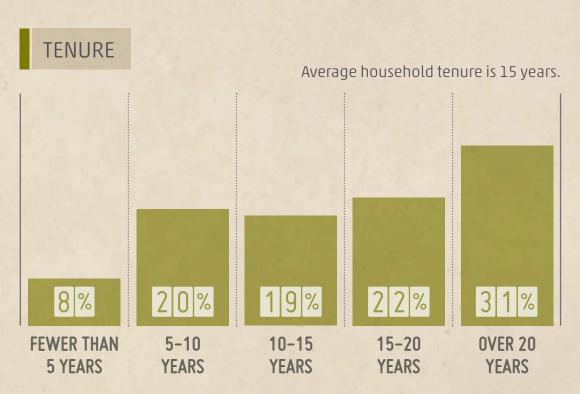
Our Clients









AVERAGE ASSETS UNDER OUR MANAGEMENT



DEBT FREE

76%



FEMALE CLIENTS



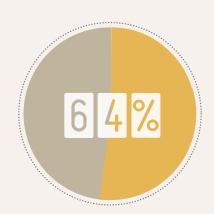
TERMINAL DEGREES (MD, PhD, JD, etc.)



MULTIGENERATIONAL FAMILIES



RETIRED



ADVANCED ESTATE PLANNING



CURRENT OR RETIRED BUSINESS OWNERS

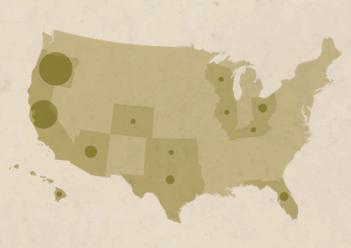
TOP QUESTIONS

Will I outlive my money?	
	··· 97%
How will the U.S. debt affect me and my family?	50%
How will inflation or deflation affect my quality of life?	36%
How will my spouse/partner manage when I'm gone?	33%
How do I transition from employment to retirement incom	ne? 31%
How do I best prepare my children for their inheritance?	14%
How do I best divide my estate?	14%

SUPPORTED CHARITIES

Human Services	
	94%
Health	28%
Religion	28%
Public Benefit	19%
Arts, Culture, Humanities	17%
International	14%
Education	11%
Animals	11%
Environment	
	6%

LOCATION





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