

Individual retirement plan value proposition statement

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Mission Statement My mission is to help you live comfortably and confidently in your retirement years.

I. Retirement planning approach

- a. I believe trust and understanding are the cornerstones of a successful long-term advisor-client relationship.
- b. I believe in tailoring your retirement strategy to fit your unique needs, goals and financial situation.
- c. I believe — regardless of what’s happening in the market — you don’t have to take excessive risks to work toward reaching your long-term goals.

II. Investment selection

- a. I believe the manager of your investments should have a philosophy and approach that’s consistent with your long-term goals.
- b. I believe, when selecting investments, you need a long-term perspective that extends throughout your retirement.
- c. I believe the key to making your retirement savings last is finding an investment manager with a long-standing commitment to generating consistent results.

III. Commitment to ongoing service

- a. I can conduct regular meetings to personally discuss your investments.
- b. I can review and recommend adjustments to your investments in response to changes in your needs, goals or overall strategy.
- c. I can review with you changes in the rules and regulations surrounding IRAs, including beneficiary designations.