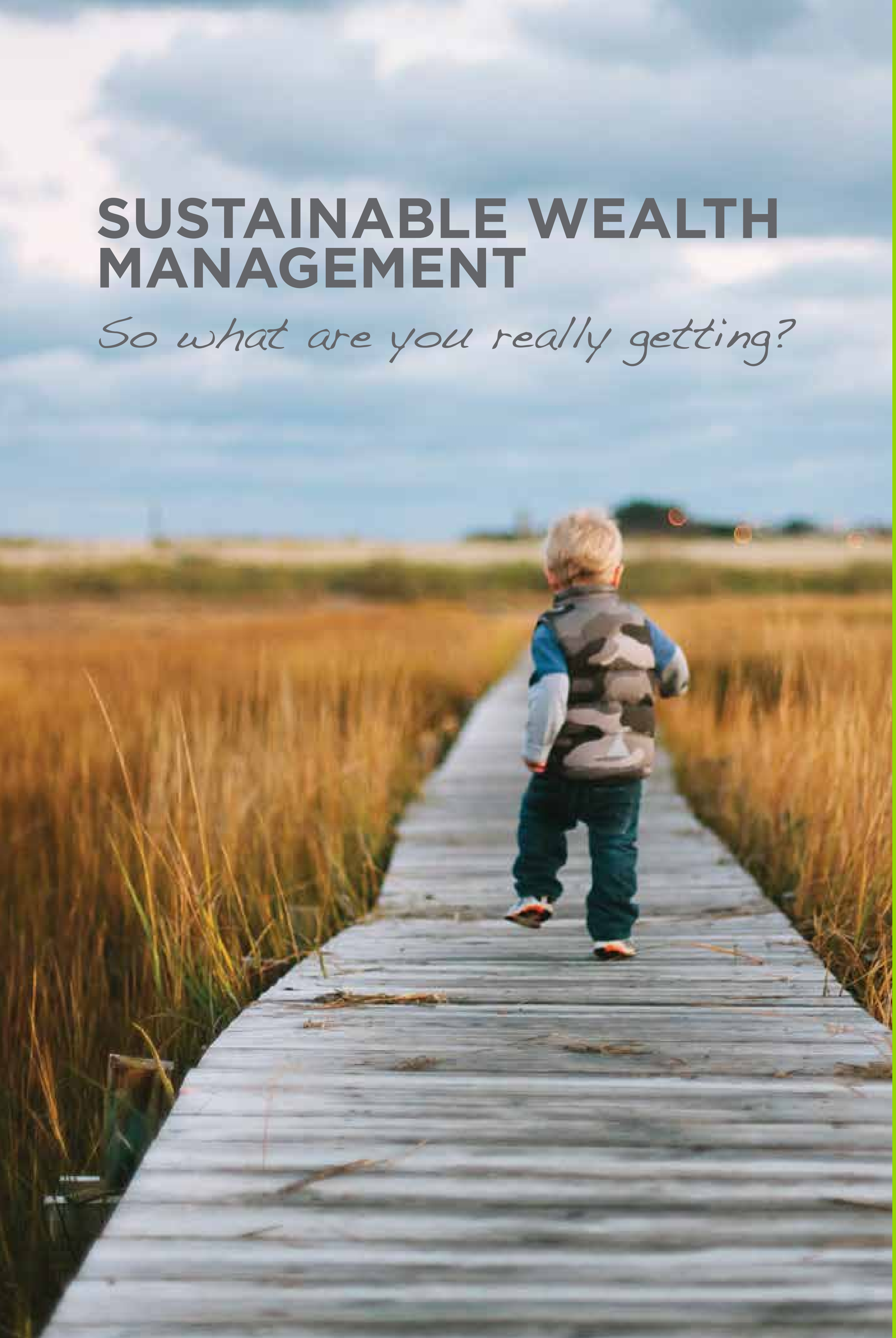
SUSTAINABLE WEALTH MANAGEMENT

You rule your investment plan. **Ready. Set. Go!**

Invested in you

SUSTAINABLE WEALTH MANAGEMENT

So what are you really getting?



Well, a lot of things.

In order for us to best meet your financial needs, we believe in keeping our clients involved and informed. This way we can create the best plan possible for investment management, your way.

PLANNING
MANAGEMENT
INFORMED
INVOLVEMENT

Over

33%

of U.S. adults have nothing saved for retirement. *(USA Today)*

Whether you're more hands on, or prefer to let us do our thing, we can make it work for your schedule and needs. We realize that things change. That's why we like to discuss goals and where things are headed so we can adjust your plan to fit the you of today.

Life's Short; Plan to Enjoy It

We'll help you plan and save for every stage—college costs, retirement, vacation homes, you name it. We'll work with you to set realistic goals and establish a plan for saving that works for you.

Plan for Change

Once your financial plan is in place, we'll create and manage the investment portfolio that best aligns with your unique ideals and goals. But we're not done yet. We recognize that goals, resources, and markets are not static—so why should your financial plan be?

Planning

Everything we do is with intention and purpose—including your financial planning.

Management

So what exactly are we doing when we're not meeting with you?

We regularly monitor your investment portfolio.We do this in line with the plans that we've laid out to help achieve your goals (There's a reason for the meeting and planning!).

MAINTAINING YOUR STRATEGY

We make sure your portfolio stays invested according to your financial goals. By creating an investment policy statement and sticking to it, we're able to lay out the optimal allocation to best meet your goals.

HOW WE INVEST

We're not day traders—we believe in a long-term buy and hold strategy. However, that doesn't mean that we set it and forget it in terms of your investments—we make tactical and strategic shifts in the allocation of your portfolio based on changing market conditions.

48%

of U.S. adults are invested in the stock market. *(Bankrate's Money Pulse Survey)*

The overall cost of college has increased by

45%

over the last decade. *(The College Board)*

Informed

Knowledge is power—which is why we believe in keeping our clients informed at every turn.

Consistent reports are your friend in terms of staying educated and accountable. And it's our job to ensure that we're communicating these reports in a way that makes sense for you. Unsure about what's what? We're here to answer any and all of your questions.

You'll receive:

- Account statements—via standard mail or electronic delivery.
- Quarterly market updates and performance reports with important details like how your account has performed over various time periods and comparisons to market bench-marks. Also via standard mail or electronic delivery.

Involvement

In order for us to go to bat for you investment-wise, we need to get to know you.

Through meetings 2-4 times a year, we're able to keep you up-to-date on your accounts, and we're also able to stay up-to-date on you. Our goal is that you leave every meeting/ phone call/ email more in the know about the process and your finances—it's that simple.

Here's what you can expect:

- Updates on account performance and allocation.
- Our current outlook on financial markets—and how it affects you.
- Discussing financial/retirement plans— count on talking about this annually or when something shifts in your financial situation.
- An estate plan chat—we'll bring this up every two years, or if something changes in your financial situation.

93%

of millennials lack confidence in their investment knowledge. *(CNN Money)*

SUSTAINABLE WEALTH MANAGEMENT

652 Officers Row
Vancouver, WA 98661
360.597.4570

sustainblewealthmgt.com

Invested in you