Second-Opinion Service

A <u>COMPLIMENTARY</u> SERVICE INTENDED TO DELIVER THE “PEACE OF MIND” YOU DESERVE

In this challenging economy, you may be in a complex financial situation or simply unhappy with the advice from your current financial advisor(s)—it’s not uncommon. At Braun-Bostich & Associates, we believe that many high-net-worth investors would value a second opinion on their finances.

To help you achieve your financial goals, we have created this complimentary second-opinion service offering. We’re pleased to offer you the same knowledge and guidance that each of our clients has come to enjoy and expect as a valued clientele of **BRAUN-BOSTICH & ASSOCIATES**.

WORKING WITH A TEAM THAT REDEFINES WEALTH MANAGEMENT

Ask ten investors to define wealth management. Actually, ask ten “wealth managers” to do so. You will almost certainly get ten different answers, with most heavily focused on investing. As a potential client of **BRAUN-BOSTICH & ASSOCIATES**, however, you would benefit from a cutting-edge team that has a clear and comprehensive vision of wealth management.

WEALTH MANAGEMENT

INVESTMENT CONSULTING	+	ADVANCED PLANNING	+	RELATIONSHIP MANAGEMENT
• Asset allocation • Portfolio management strategies • Manager due diligence • Risk evaluation • Performance analysis		• Wealth enhancement, including cash flow, tax planning and liability management strategies • Wealth transfer • Wealth preservation strategies • Charitable giving		• Regularly scheduled calls, reviews and in-person meetings • Team of professionals, including legal, tax, insurance and investment advisors

Continues reverse side

<u>OUR CONSULTATIVE PROCESS</u>

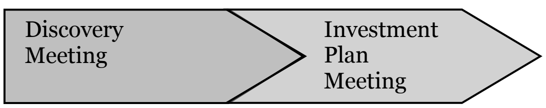
We approach each new engagement with a consultative process. This allows us to have an open dialogue in which we learn about every client's values and goals while working with them to tailor a plan to help achieve them. The five-step experience below illustrates the consultative process you would undergo as a **BRAUN-BOSTICH & ASSOCIATES** client. Through our second-opinion service, you can enjoy a portion of this experience <u>at no cost</u>.

FULL CLIENT EXPERIENCE

<u>WHAT TO EXPECT FROM OUR SECOND-OPINION SERVICE</u>

We will first meet with you for a **Discovery Meeting**. Assuming that we both agree that we have a basis for working together, you would return for the **Investment Plan Meeting**. Hopefully, we can confirm that you are on track to fulfill your values and achieve your goals with your current financial provider(s). If needed, we will suggest ways in which we can help, including recommending another provider if we are not a good fit for your needs. Either way, you'll receive a **Total Client Profile** and a personalized analysis of your current situation.

SECOND-OPINION SERVICE



"LET US HELP YOU SECURE FINANCIAL PEACE OF MIND"
CONTACT US TODAY

BRAUN-BOSTICH & ASSOCIATES, INC.
1600 Ashwood Drive, Suite 1601
Canonsburg, PA 15317
Phone: 724.942.2639
Fax: 724.746.1782
Amy@Braun-Bostich.com
Amy J Braun-Bostich
MSFP, CFP®, APMA®, CFS®, CLTC
CEO & Private Wealth Advisor