Second-Opinion Service

EXCLUSIVELY FOR FRIENDS, FAMILY AND ASSOCIATES OF OUR MOST VALUED CLIENTS

In this challenging economy, you probably know a friend, family member or colleague who may be in a complex financial situation or simply unhappy with the advice from his or her current financial advisor—it's not uncommon. At Braun-Bostich & Associates, we believe that many wealthy investors would value a second opinion on their finances.

To help the people you care about achieve their financial goals, we have created this complimentary second-opinion service offering. We're pleased to offer your friends, family members and associates the same knowledge and guidance that you have come to enjoy and expect as a valued client 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

Revised November 2022

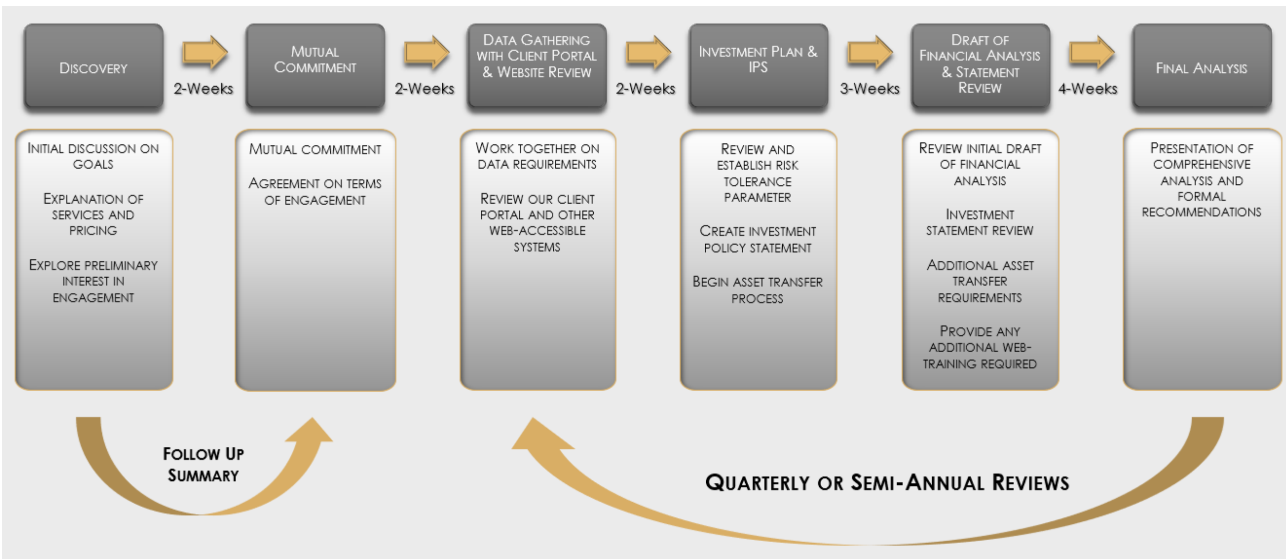
OUR 6-STEP WEALTH MANAGEMENT PROCESS

Our focus is to create plans that match your needs, your hopes and your dreams. This all starts with our discovery meeting. We take time to listen. With your goals as a guide for our process, we make recommendations that can support your vision for a financially independent future.

After you've identified your top investment and saving priorities, we implement planning strategies. We establish your financial plan, and then follow up at regular intervals to ensure that we're doing all that we can to keep your investments on track to match your goals.

We manage your investments—we keep track of tax complexities, compliance details and changes in the market—so that you can focus on other priorities in your life. Through our **second-opinion service**, your friends, family members and associates can enjoy a portion of this experience at no cost.

FULL CLIENT EXPERIENCE



WHAT TO EXPECT FROM OUR SECOND-OPINION SERVICE

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

NO-OBLIGATION SECOND-OPINION SERVICE

Revised November 2022

“LET US HELP YOU SECURE FINANCIAL PEACE OF MIND” … CONTACT US TODAY

SETUP AN INTRODUCTORY CALL WITH ONE OF OUR ADVISORS

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