

Getting a second opinion is always a healthy financial choice.

Time for your check-up? A recurring theme producing cognitive dissonance within many prospective clients is the unspoken concern that the evolving complexity of their lives and expanding finances may have outpaced their existing advisors' consultative capabilities. Change is emotionally difficult so how might one discover if there is an elevated level of proactive counsel available without carrying an obligation to alert or change current allegiances?

Story's Second Opinion Offering is a focused, trial engagement designed to deliver abundant value to prospective client families without obligation to move assets or change allegiances. This offering allows prospective clients to experience alternate, elevated counsel in order to determine if a new advising alignment is warranted. In the medical world, a complex diagnosis warrants a "Second Opinion". **Schedule your second opinion today.**

Core Financial Analysis / Second Opinion

Estimated Time Frame: Approximately 6 months • Fee Structure: Flat fee – \$2,500 with a service delivery guarantee

Organization + Decision Empowerment Focus

- Build a comprehensive financial model that permits collaborative creation of alternate scenarios which empower families to make more confident financial decisions based on improved insight
- Provide access to a custom, encrypted client website containing an array of financial data, summary reports, and an electronic storage vault for vital documents

Employee Benefit + Equity Compensation Focus

- Craft the ideal option exercise strategy using statistical and wisdom-based modeling
- Optimize benefit elections for maximum company contribution and goal alignment
- Prepare strategic Open Enrollment election recommendations
- If desired, obtain a 3-year income tax review from a qualified professional

Investment Risk, Cost + Allocation Focus

- Coordinate your company sponsored investment allocation with your non-company investment allocation to achieve optimal alignment across your entire portfolio
- Outline the difference between risk "tolerance" and a more beneficial perspective known as risk "preference" and how this new knowledge impacts portfolio allocation decisions
- Develop an investment strategy or "worldview" which coexists with market volatility
- Provide insight on the tax and cost effectiveness of your current investments

Estate Plan + Risk Product Focus

- Deliver a review of your current estate plan
- If appropriate, give direction to bring your Estate and Legacy plans into the 21st Century using the latest design opportunities and the best jurisdictions, like South Dakota
- Provide a thorough review of all risk products and asset protection techniques given the context of your present and expected financial circumstances including: Life, disability, long-term care, property, casualty and liability insurance

START YOUR STORY @STORYCAPITAL.COM OR CALL 952-657-7200

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