STORY CAPITAL, LLC
Strength Along Your Journey

Ongoing Relationship Process

Your ongoing relationship with Story Capital is centered around two (or three) key review meetings, scheduled during the same intervals each calendar year. The overall intent is to proactively review the major topics which are vital to successful achievement of your family objectives from both a financial and qualitative point of view.

Note: While we schedule only two meetings systematically each year, Story Capital is always available to promptly answer your questions and respond to unexpected developments throughout the year. This may be related to a change in job or family status, a new development in tax or legislative policy, or events prompting market volatility. Rest assured that while we are available to promptly *respond* to the unexpected, Story will make every effort to *proactively advise* for the benefit of your known family objectives.

Spring Meeting: (March – May)

- Personal Update—What is important to you right now?
- Pre-plan for employee benefit plan open enrollment elections
- Review your current market risk perception
    - Discuss Story's current market risk worldview
    - Review current Macro portfolio risk allocation
    - Review your current risk reduction products:
        - Life, Disability, Long Term Care, P&C
- Survey relevant tax law updates and Story's view over the horizon
- Review estate, legacy, and asset protection plan
- Review stock option exercise plan, if applicable, for the next 1-3 grants
- Develop new "Scenario Switch" requests
- Discuss your "parking lot" list

Fall Meeting: (September – November)

- Personal Update—What is most important to you right now?
- Pre-plan for employee benefit plan open enrollment elections
- Review your current market risk perception
    - Discuss Story's current market risk worldview
    - Review current Macro portfolio risk allocation
- Review or initiate calendar year tax planning
- Cash needs planning—sources & uses— for the coming 12-month horizon
- Develop new "Scenario Switch" requests
- Discuss your "parking lot" list
- Optional: Coordinate an Advisory Team Alignment Meeting
    - Accountant, attorney, and investment team meeting in the same room at the same time with you

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