

# Your Options

In comparison to DIY options, robo-advisors, traditional wealth management firms, banks, and brokers, FWM offers a fiduciary standard of care, personalized strategies, and dynamic asset allocation. Our focus on deeply integrated wealth planning and investment strategy sets us apart from the typical offerings in the market.



Wealth Planning	Faubion Wealth Management	Do-It-Yourself	Robo Advisor	Traditional Firm	Insurance Company/ Bank Advisor	Commission-Based Broker
Comprehensive Guidance On All financial Matters	✓			✓	✓	
Private and Public Company Stock-based Compensation Optimization	✓					
Executive Compensation and Benefits Package Strategy	✓					
Privately Held Business Valuation and Planning	✓					
Private Company Retirement Plan Implementation	✓					
Cash Flow and Goals-based Modeling	✓			✓		
Net Worth Tracking and Projections	✓			✓	✓	
Balance Sheet and Asset Location Optimization	✓			✓		
Tax Return Analysis and Planning	✓			✓		
College Education and Student Loan Planning	✓			✓	✓	
Guidance On Estate Planning Matters	✓			✓		
Asset and Wealth Protection Strategy	✓				✓	
Deeply Integrated Wealth Plan and Investment Strategy	✓					
Outsourcing of Time Required to Make Wealth Planning Decisions	✓			✓	✓	
Coordination With Necessary Professionals (CPA, Attorney, etc.)	✓			✓	✓	
Investment Management						
Fiduciary Standard of Care	✓		✓	✓	✓	
Strategies Customized to You	✓	✓		✓		✓
Quantitative Risk Profiling Process	✓					
Dynamic and Tactical Asset Allocation	✓			✓		
Managed for Risk	✓			✓		
Disciplined Rebalancing Techniques	✓		✓	✓	✓	
Strategic Tax Loss Harvesting	✓		✓	✓	✓	
Tax-efficient Placement of Investments	✓		✓			
Integration of All Accounts Into One Portfolio Strategy	✓					
Low-cost Investments	✓	✓	✓			
Alternative Investment Strategies	✓					
Account Simplification and Consolidation	✓			✓		
Management of Held-away Accounts (401(k), etc.)	✓					
Outsourcing of Time Required to Manage Wealth	✓		✓	✓	✓	✓
Behavioral Coach to Guide You Through Volatile Times	✓			✓	✓	
Propriety Products					✓	✓