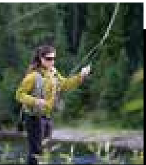
Paradigm

strategies in wealth management






A new paradigm is needed
in the financial world
based on the principles
of **Trust**, **Transparency**,
and **Accountability** – held
together by a level of
client service that sets
a **new standard**.

Financial Planning.
Wealth Management.
Retirement.

Sound scary? It's a lot of work even *thinking* about money and how to plan for the future. **It can be stressful**. Life is busy. It takes time. It takes information.

However, the **decisions you make right now will largely determine your financial future** and your position entering retirement.

Economies change. Markets fluctuate. These are the variables. The constant is your financial plan. And **the best plan -- in any type of market -- is to have a plan**.

Imagine how much better you will feel to have that plan in place. **That's our job**. We make it easy. It's our business to know what you need and when you need it.

You focus on the goal.

We'll focus on getting you there.

PARADIGM MANAGEMENT PROCESS:

Discovery Meeting

Identify current status, goals and challenges.

Wealth Planning Meeting

1. Prioritize objectives. 2. Present recommendations. 3. Timetable for completion.

Commitment Meeting

Discuss benefits of working together and commit to stated goals.

Orientation Meeting

Organize paperwork and answer questions.

Regular Progress Meeting

Address overall progress and discuss new issues.

CUSTOM WEALTH MANAGEMENT

1

DISCOVERY MEETING

We identify and discuss challenges you'll face in working toward your financial goals. We'll look at where you want to go and how you can get there.

2

WEALTH PLANNING MEETING

We present a complete picture of your current situation and make recommendations for achieving your financial goals. We give you plenty of time to review the recommendations and evaluate the partnership, because longevity and trust is *our* goal.

3

COMMITMENT MEETING

After careful review and consensus, we are ready to commit to a mutual partnership and execute the documents necessary to put your wealth management plan into action.

4

ORIENTATION MEETING

The orientation meeting is designed to meet you at a point in the process where we can help organize new paperwork you may be receiving and answer questions that have come up as you become more familiar with your financial plan.

5

REGULAR PROGRESS MEETING

We'll schedule meetings at regular intervals that are convenient to you. We'll review changes, progress and re-evaluate goals that may change as time goes by.

What Makes Paradigm Unique?

We could write about our experience (*over 20 years*), our passion for excellence (*always*), and the assets our staff possess (*the best*), and leave it at that. But then, you'd be missing half the story.

What really sets us apart from the crowd is our steady, assured approach to financial management. Unlike a broker, Paradigm is a fiduciary – and bound *by law* to act in the best interests of our clients. Isn't that how it should be?

We will never pressure you. Planning for retirement and legacy should be pleasant – *something to look forward to* – and we strive to make it that way. We specialize in affluent individuals and families, often collaborating with personal accountants and lawyers, to determine the best possible financial strategy across the board to achieve your financial goals. Think of us as your personal Chief Financial Officer.

Our philosophy is even simpler than that: *the best financial plan is to have a financial plan*. You just have to find the right people to help you. That's Paradigm.