Your Future is Our Focus.

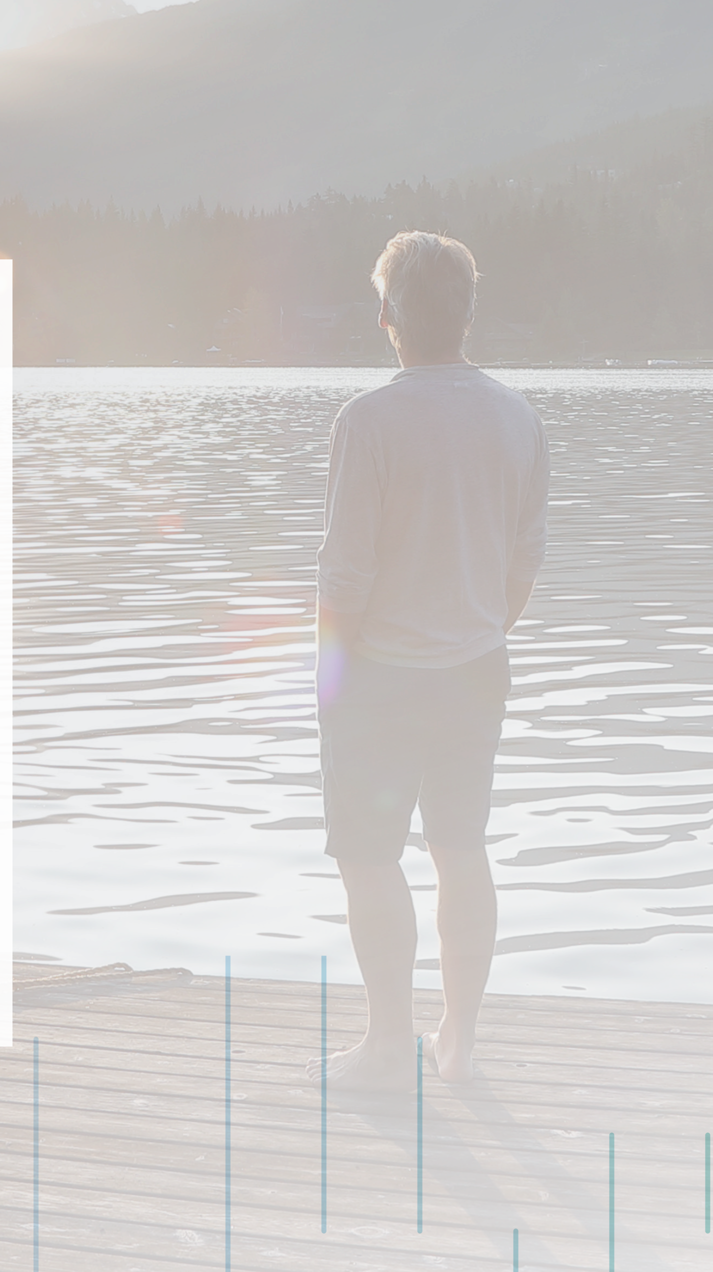
As your trusted partner and advocate, we help you **reimagine what's possible at the intersection of life and finance**. Start your financial future with **Focus Partners Wealth**.

FOCUS PARTNERS | WEALTH

Envision it:

peace of mind.

What Brings You Here?
Many of our clients turn to us when navigating significant financial decisions. Ultimately, they seek the freedom to focus on what matters most—whether that means family, travel, philanthropy, or living with confidence for the future.



At Focus Partners Wealth, we believe your financial strategy should begin—and evolve—with **you**.

What do you want to achieve? Retire confidently? Start a new business? Lay the groundwork for future generations?

We Help You:

Navigate life.
As a fiduciary, your advisor prioritizes your interests, listens intentionally, and refines your plan as life evolves.

Gain clarity.
Your advisor offers clear, objective guidance for the future. That way, you can stay focused on enjoying today.

Feel empowered.
Together we create a strategy based in deep expertise and tailored to your goals—so you can move forward with conviction.

WHO WE ARE

Focus Partners Wealth is a nationwide team of financial professionals with offices in your community, dedicated to building sound plans that enable a meaningful life.

Our advisors deliver personalized wealth plans, placing your values, goals, motivations, and priorities at the heart of everything we do.

Every relationship starts by getting to know you—and your definition of success—so we can help you live it.

Expansive resources combined with a truly personal experience.

National presence.

First-name basis.

At **Focus Partners Wealth**, you partner with a fiduciary advisor who delivers a **highly personalized experience**, backed by the extensive resources of a nationwide financial institution. Leveraging a team of specialized professionals, your advisor brings a broad range of **technical insights** and **strategic thinking** to every conversation.

MEET YOUR TEAM

Your Advisory Team

Your advisors are front and center—accessible and engaged. We build strong relationships by asking the right questions, listening carefully, and showing up with answers, actionable insights, and ongoing support when you need it.

The Broader Partnership

When you work with us, you gain access to the collective expertise of our nationwide firm. Your advisors collaborate closely with allied professionals across the organization, sharing real-time investment insights, strategic planning, and best practices—so your financial plan can be informed by the latest thinking.

Your Trusted Circle

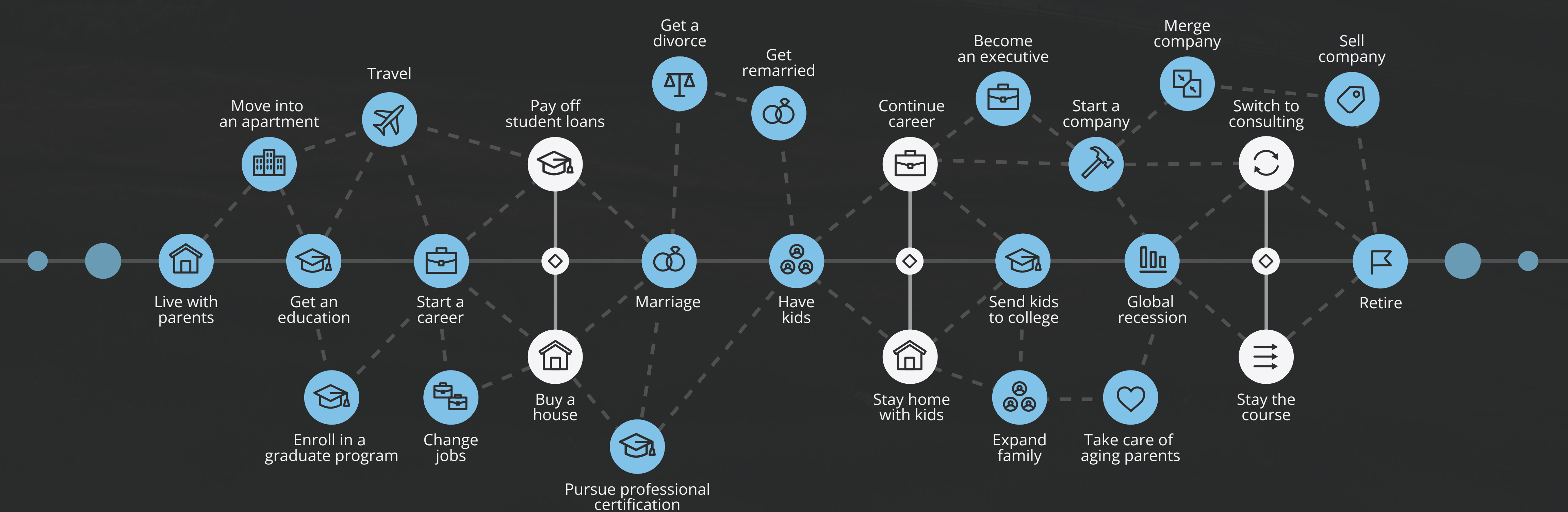
Our goal is to make sure every piece of your financial life works in harmony. Beyond portfolios, your wealth supports your lifestyle, health, and meaningful experiences. Whether you need assistance with life transitions, wellness, travel, or security, your advisors connect you with resources and trusted partners to support you along the way.

Life isn’t linear.

Your financial plan shouldn’t be either.

A clear path on life’s winding road.

Every stage of life brings new challenges and opportunities. That’s why we believe you need more than just a plan—you need a partner. Our advisors support you at every step, offering perspective, clarity, and well-rounded guidance. When life happens, we’re your first call.

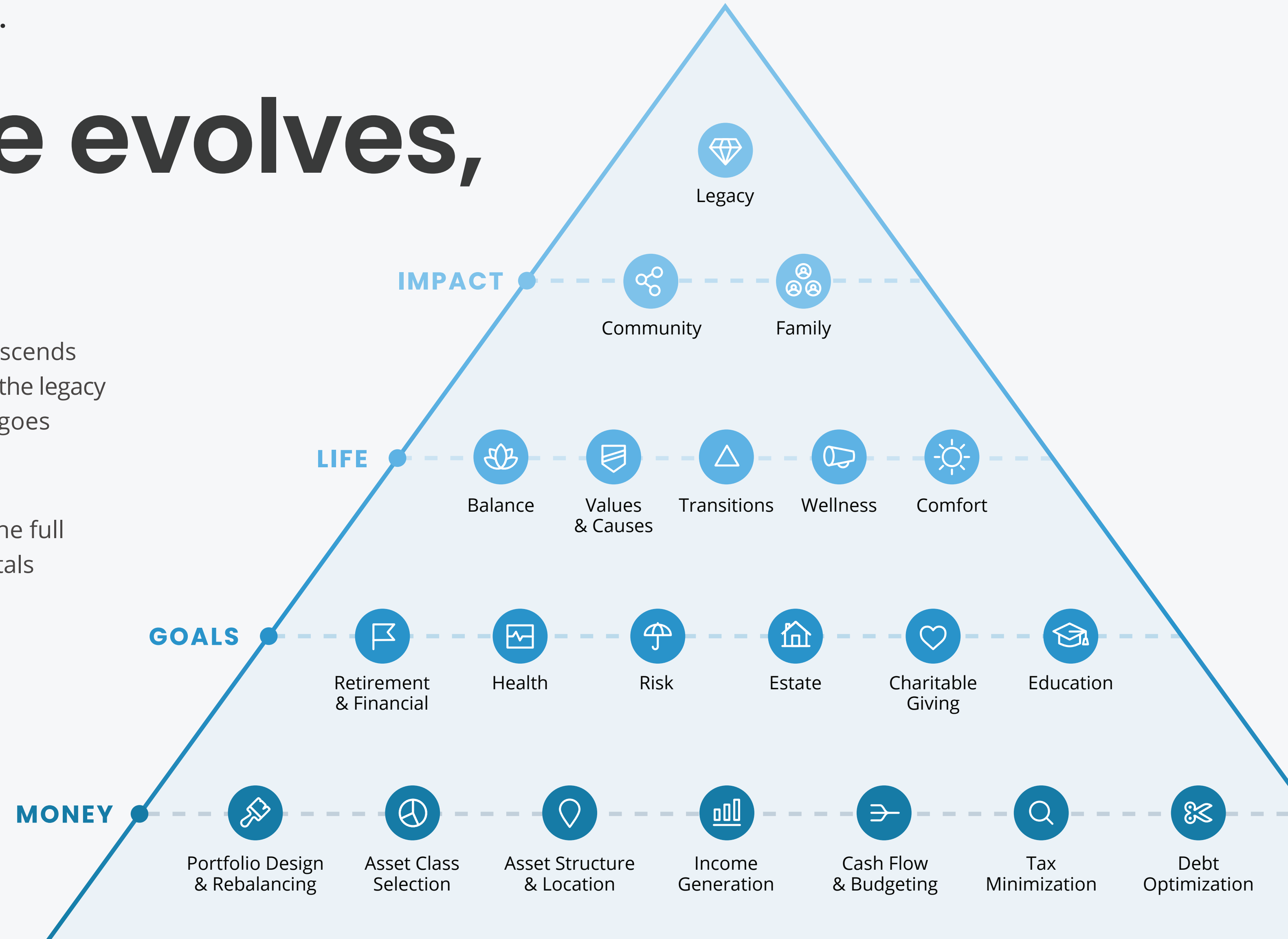


Your purpose in life is paramount to us.

As your life evolves, so do we.

We understand that wealth management transcends assets—it encompasses your goals, values, and the legacy you aspire to leave. That's why our guidance goes beyond investment decisions.

We believe your financial plan should reflect the full picture of your life, building on the fundamentals while embracing life's complexity.



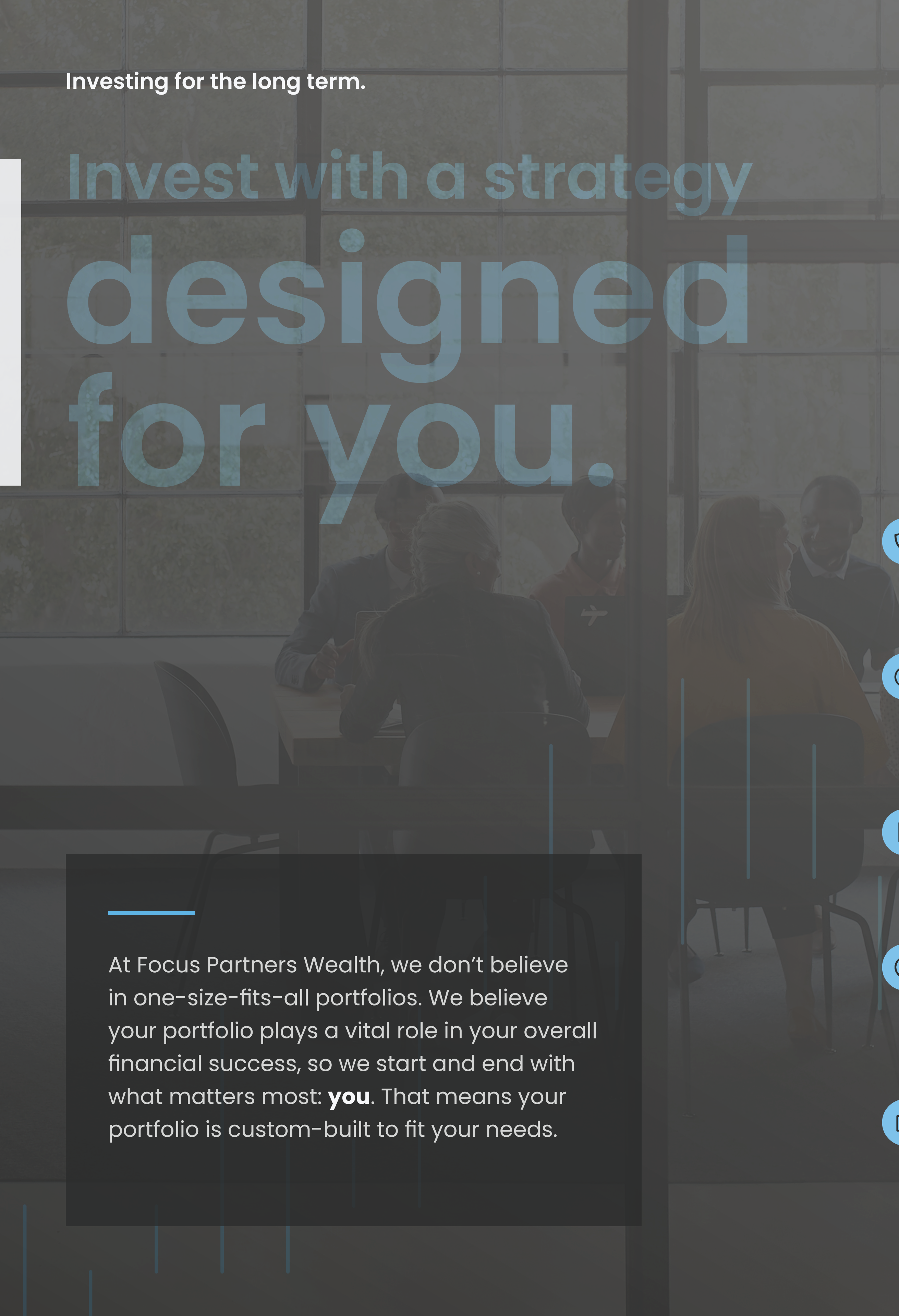
From major life transitions to subtle shifts, your evolving circumstances create new opportunities. **We're here to help you stay on course toward your aspirations**—guiding you through complex decisions, keeping your plan aligned with your future, and **empowering you with advice to navigate every turn**.

OUR PROCESS

We start with a **deep discovery process** to understand what truly matters to you—your values, priorities, and long-term goals.

Leveraging a wide range of resources, we **build a financial plan** that is tailored to your goals, backed by investment strategies designed for you.

Together, we regularly revisit and **refine your plan**, ensuring it evolves with your life and today's ever-shifting financial landscape.



Investing for the long term.

Invest with a strategy designed for you.

At Focus Partners Wealth, we don't believe in one-size-fits-all portfolios. We believe your portfolio plays a vital role in your overall financial success, so we start and end with what matters most: **you**. That means your portfolio is custom-built to fit your needs.

INVESTMENT PHILOSOPHY

Clients First, Always.
Our fiduciary duty is at the heart of who we are. We manage your assets with the same discipline and care we apply to our own. Acting in your best interest isn't just our responsibility—it's a mindset that drives every decision we make.

Asset Allocation Sets the Foundation.
Asset allocation drives your portfolio's returns. Strategically distributing investments across asset classes helps balance risk and growth over time, especially as your needs and economic conditions change. An optimal allocation is essential to a long-term investment strategy.

Goals Define Risk Management.
Achieving your goals takes more than generating returns. It requires thoughtful risk management. We evaluate both absolute risk (potential loss) and relative risk (performance against benchmarks) to improve your potential for long-term success.

Time Powers Every Plan.
One of the greatest advantages in investing is a long time horizon. While markets react to the moment, we stay focused on the long view. Our priority is to align your goals with an investment plan tailored to your timeline, seeking opportunities that reward discipline and patience.

Markets Evolve And So Do We.
Change is constant, and we embrace it. Our scale provides access to deep research and timely insights, empowering us to adapt with clarity and confidence as conditions change, both in our clients' lives and around the world.

Your first year with us.

What will your journey look like in practice? Some of the key moments during your first year as a client illustrate our annual planning approach. Since each client's circumstances are unique, your advisory team will tailor your experience to address both your short- and long-term priorities. Ultimately, we aspire to help you envision a better financial future and set in motion actionable plans toward achieving that vision.

Potential collaboration opportunities ★
with your team of specialized professionals, including your estate attorneys, insurance providers, and accountants, among others.*

- DISCOVERY PROCESS
- GOAL-BASED RETIREMENT PLANNING
- INVESTMENT PLANNING & IMPLEMENTATION
- TAX PLANNING ★
- TAX PREP & FILING ★
- TAX RETURN ANALYSIS
- ESTATE PLANNING ★
- INSURANCE NEEDS & ANALYSIS ★
- NET WORTH PLANNING & CASH FLOW
- MULTIGENERATIONAL PLANNING
- YEAR-END REVIEW
- SITUATIONAL WEALTH PLANNING CONVERSATIONS (AS LIFE EVENTS HAPPEN)
- PORTFOLIO MONITORING & REBALANCING
- ONGOING SERVICE & SUPPORT
- INSIGHTS, EDUCATION, & EVENTS

*Some of the services listed above pertain to working with your external advisors and may not apply to your individual situation.

Ready to start your Focus Partners Wealth experience?

Envision a plan tailored for you—one that reflects your goals, values, and the life you're building. We believe that clarity emerges when life and finance are brought together with purpose.

Work side by side with a dedicated advisor who brings clarity, discipline, and strategy to every step of your financial journey. Our thoughtful approach to investing and planning is designed to help you move forward with confidence.

Get the best of both worlds: **personalized guidance from a trusted partner who knows you, supported by the insights and resources of a national firm**.

Visit us at
focuspartners.com

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