Plains Wealth Management

***PLAINS WEALTH MANAGEMENT** is a leader in tax-advantaged financial planning. We strive to be an independent practice that operates with discipline and transparency as we serve our clients. We deliver proactive, relational service tailored to your individual needs that goes beyond the numbers of your financial plan. With our guidance and education, our clients can live a life based on their unique goals as they pursue financial security. Our only priority is empowering you to be able to take care of yourself and your family. At Plains Wealth Management, we believe that long-term relationships that encourage open and honest communication are the cornerstone of success.*

We take a team approach to all our clients. You will have a Wealth Management team that works together to develop, implement, and review your road-map as well as a support staff to assist with your needs and questions along the way.

SERVICES

INVESTMENTS A disciplined, long-term approach to building globally diversified portfolios with a focus on minimizing tax liabilities. We leverage our own specialized expertise, plus the advanced research of Raymond James, our broker-dealer.

FINANCIAL PLANNING Expert decision making support, tailored to your unique needs. We help you set goals, create a comprehensive plan, review performance and make periodic strategic adjustments to your financial plan.

INSURANCE Unbiased, tax-centric advice on life, long-term care and disability coverage. To provide you with greater value and coverage that meets your specific needs and protect your legacy.

RETIREMENT PLANNING Complete investment planning for retirement — helping you develop a clear vision of how you define retirement. Taking a close look at your potential retirement-income sources we help you realize your vision for retirement.

ESTATE PLANNING Guidance on how to pass your wealth on to reduce or eliminate taxes to your beneficiaries. We coordinate with attorneys on wills, trusts, and other legal documents.

BUSINESS PLANNING We help you consider the possible tax implications of a legal entity, such as business structure, retirement plans, compensation, business insurance and other issues.

EDUCATION PLANNING Instruction on available investment vehicles and tax-saving options. Together, we can develop a plan to help fund education for your children, grandchildren, other family members grandchildren, other family members — or even you.

TAX MANAGEMENT Proactive tax planning to minimize the taxes you owe. Our expertise in both investment and tax makes us uniquely positioned to provide tax management advice and services.

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WHAT TO EXPECT

Our process begins with a complimentary initial meeting where we introduce our practice and services to you and gain a better understanding of your current financial situation, goals and concerns. We provide you with a list of documents to bring that will assist us in gaining a better understanding of your unique situation.

After learning more about you and your goals, we arrange for a second meeting where we will present you with an assessment of your current financial health and how we can help you plan for your financial future.

We will then begin to build a tax-smart plan for your financial success. Our comprehensive financial planning services include risk assessment, retirement planning, estate planning, tax planning, education planning and cash management.

We believe that for your financial plan to be successful and stay relevant, we must stay current on your situation and life changes. Our advisors will review your portfolio with you, in person, every quarter.

01. INTRODUCTION MEETING

02. PLAN PRESENTATION

03. IMPLEMENTATION

04. REVIEW AND REFINE

OUR REPORTING

We review client portfolios quarterly but can meet more frequently if you experience major life changes. All of our clients receive comprehensive statements quarterly in addition to having 24-hour online access.

| Investments | Financial Planning | Insurance |

| Retirement Planning | Estate Planning | Education Planning |

| Business Planning | Tax Management |

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