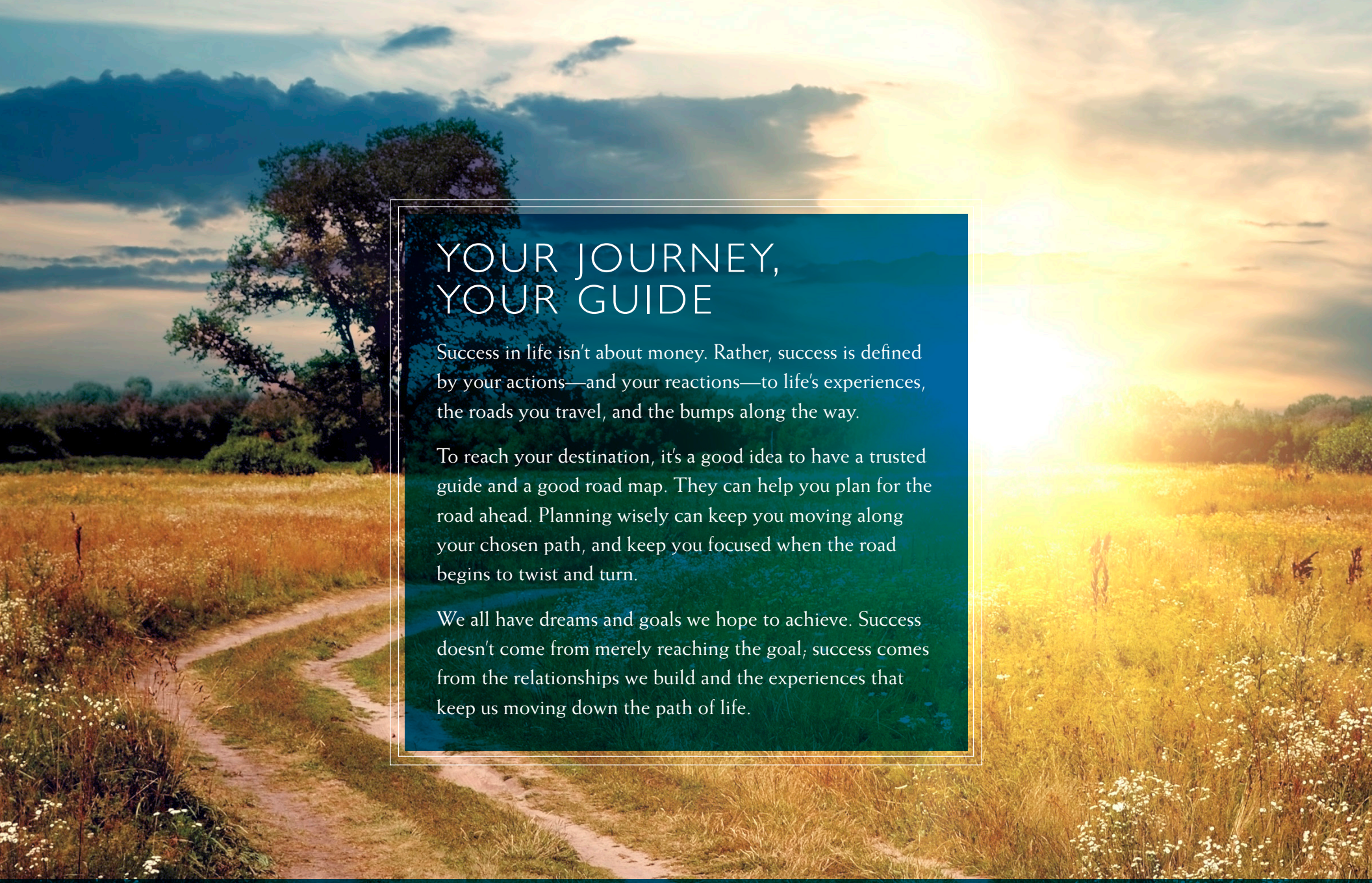

FOLLOW YOUR OWN PATH
LIFEPATH
WEALTH ADVISORS



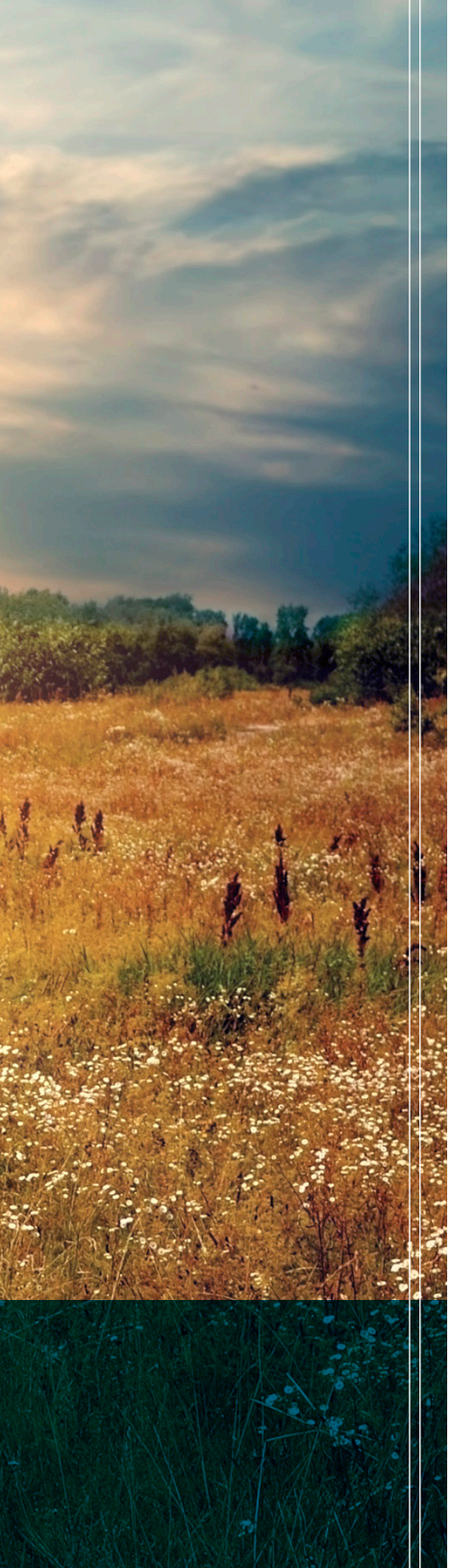
YOUR JOURNEY, YOUR GUIDE

Success in life isn't about money. Rather, success is defined by your actions—and your reactions—to life's experiences, the roads you travel, and the bumps along the way.

To reach your destination, it's a good idea to have a trusted guide and a good road map. They can help you plan for the road ahead. Planning wisely can keep you moving along your chosen path, and keep you focused when the road begins to twist and turn.

We all have dreams and goals we hope to achieve. Success doesn't come from merely reaching the goal; success comes from the relationships we build and the experiences that keep us moving down the path of life.

AT LIFE PATH WEALTH ADVISORS, WE OFFER STRATEGIES TO HELP YOU SAVE, INVEST, AND WORK TOWARDS PROTECTING YOUR FINANCES SO YOU CAN STOP AND ENJOY THE VIEWS, AS WELL AS TACKLE THE CHALLENGES… WHEREVER YOUR PATH LEADS.



LIFE PATH WEALTH ADVISORS: VALUE IS MORE THAN MONEY

As financial advisors, our job is to show you how to build your wealth. And as your guide along life's financial pathways, we strive to bring you advice and direction.

We value people over money, integrity over profit, and simplicity over complexity by striving to uphold the following principles–every day, with every decision, and in every situation:

Always do the right thing.

That's where our path begins. That's what we strive for, and we believe that success comes from always doing what's right.

Care for our employees.

By treating our employees with respect and consideration, we foster an environment of caring that extends to those we serve.

Care for our clients.

We are available when you need us, not only when our schedule permits, providing personalized, dedicated service to help meet your unique needs. We pledge to offer this same commitment to your children and grandchildren, should we have the pleasure of serving them.

Care for our communities.

Contributing to our community is a part of who we are. By putting our time and our money toward causes we believe in, we help our communities and the people in them.

AS THE SEASONS OF YOUR LIFE CHANGE, IS SOMEONE YOU TRUST WATCHING THE ROAD AHEAD?

At Life Path Wealth Advisors, our team can guide you through all of life's seasons.

We offer:

- Comprehensive financial planning
- Education planning
- Family needs planning
- Asset management
- Executive and employee benefits
- Retirement planning
- Estate and tax planning
- Legacy and multi-generational planning

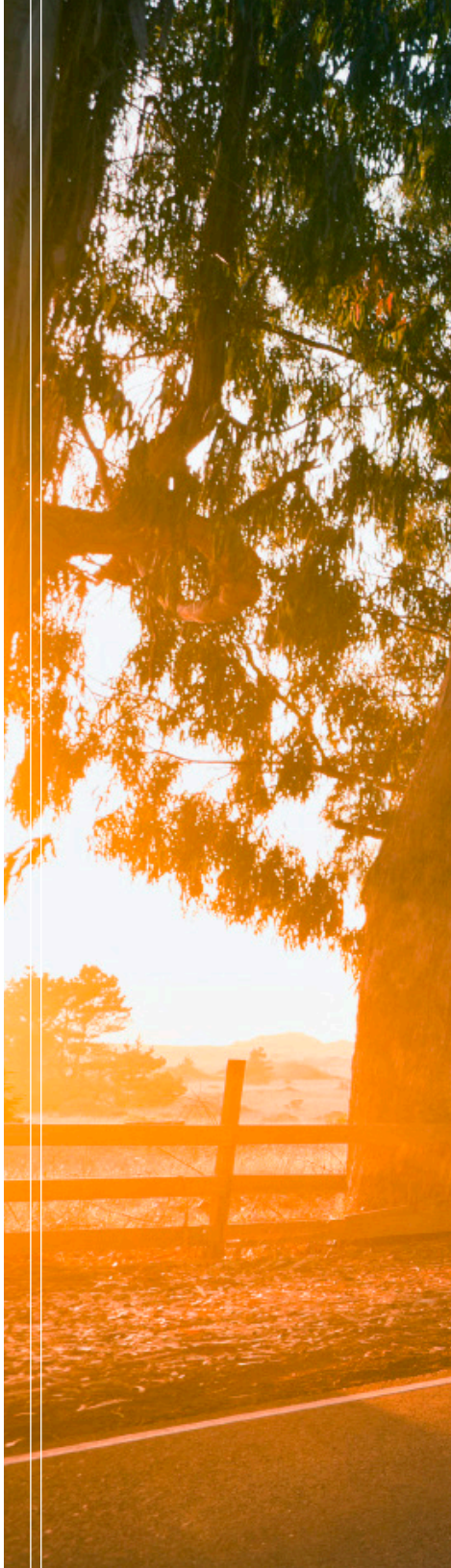
We offer strategies—based upon your own unique circumstances and needs—using a mix of products chosen specifically for you.

Your portfolio may include:

- stocks and bonds
- tax-deferred and tax-advantaged investments
- fixed and variable annuities
- mutual funds and ETFs
- CDs
- REITs
- alternative investments

We are also experienced in:

- 529 college savings plans
- life insurance
- long-term care



RELATIONSHIPS MATTER, WHEREVER YOU BEGIN

We take the time to get to know you and your needs, your dreams and your goals. Then, we create a Life Plan just for you.

No matter where you begin, your Life Plan is designed to guide you toward your goals. From start to finish, through the ups and downs, the victories and challenges, Life Path Wealth Advisors delivers a comprehensive and holistic approach.

You receive personalized services, whether you are:

- Just starting out
- Building your assets
- A small business owner
- Preparing for retirement
- Retired

No matter the season, we are here to help you anticipate and adapt to life's changes.

OUR 7-STEP PROCESS TO PURSUING A SECURE FUTURE

Financial security doesn't happen by accident. We use a thoughtful, deliberate process to work toward getting you there. Together, we will:

- Define your goals
- Review your assets
- Analyze your needs
- Provide recommendations
- Implement execution of the plan
- Monitor and track your results
- Refine and revise as circumstances dictate

Each step along the way helps bring you closer to your destination.

THE ROAD FROM HERE TO THERE IS SHORTER FOR THOSE WHO KNOW THE WAY.

OUR MISSION

We recognize and celebrate that we each choose our own path. As you follow the road ahead of you, Life Path Wealth Advisors will be there to help you make smart financial decisions.
By helping you anticipate and adapt to life events that are sure to come, you can be confident in the road ahead. We believe that personalized service contributes to success, and that always doing the right thing helps smooth the bumps in the road. By guiding you in making well-educated financial decisions, we strive to develop a valuable, long-term relationship. We want to know you personally, to bring you unbiased, comprehensive advice that helps you achieve your Life Plan.

INDEPENDENCE POWERED BY LPL FINANCIAL.

Life Path Wealth Advisors is supported by the resources of LPL Financial, the nation's largest independent broker/dealer.* Through this relationship, we have access to unbiased research and a comprehensive suite of tools, resources and technology. Because we are independent, with no proprietary products to sell or sales quotas to meet, we are able to bring you objective financial guidance and investment recommendations that are free of conflicts of interest.

Our team at Life Path Wealth Advisors welcomes your call or visit. Contact us to learn more about our services and process, and how we can help you pursue your financial goals.

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* As reported by *Financial Planning* magazine, June 1996-2014, based on total revenue.

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