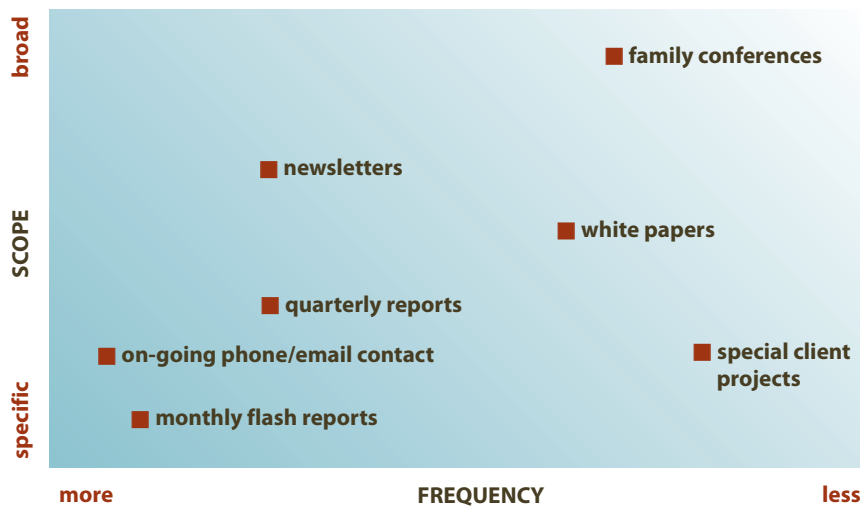


Comprehensive Communication

Effective communication is essential for a successful wealth management relationship. We work diligently to develop a communication strategy for each client, their family and other advisors to ensure complete understanding of their portfolio structure and activities.

Avenues of Communication



Frequently Addressed Topics

- ▶ Capital Market Conditions
- ▶ Asset Allocation
- ▶ Tactical Review
- ▶ Asset Class Research
- ▶ New Investment Ideas
- ▶ Performance Results
- ▶ Assessing Goals
- ▶ Estate Planning
- ▶ Charitable Giving
- ▶ Family Education & Governance
- ▶ Tax Issues