PICKLER
WEALTH ADVISORS

OUR PROCESS OF EXCELLENCE

FOR INTERNAL USE ONLY

OUR PHILOSOPHY

A Client Relationship should be started and maintained through stewardship rather than salesmanship.

3 Key Drivers of Success

1. Core Solutions Process

The products and services we provide and how they are delivered to differentiate and de-commoditize us.

2. Practice Management Process

The degree to which we have professionalized the client experience with best practices.

3. Relationship Management Process

Overall communications and branding strategy, focus on ensuring our clients and prospective clients understand and appreciate our value.

We are in the Knowledge-for-Profit business.
We think for a living.

3 A's	**Assets, Attitude, Advocacy**
3 D's	**Discover, Design, Deploy**
3 R's	**Retain, Refer, Replicate**

IDENTIFYING IDEAL CLIENTS

The "Triple A" client is our ideal client.

Assets	Sufficient assets which makes the relationship mutually profitable
Attitude	A desirable attitude, valuing our services and willing to pay for them
Advocacy	Willingness to become a client advocate to peers — a "Raving Fan"

Our 3 R's Marketing Approach

1. Retain

Provide outstanding service and customized solutions for clients. It is easier to keep a client then to bring on a new one.

2. Refer

Create a comfortable environment for clients, friends, and associates, reflecting our advocacy role.

3. Replicate

Seize the opportunity to convert prospective clients to new clients and create "Raving Fans"

REMINDER:
We are in the Knowledge-for-Profit business.
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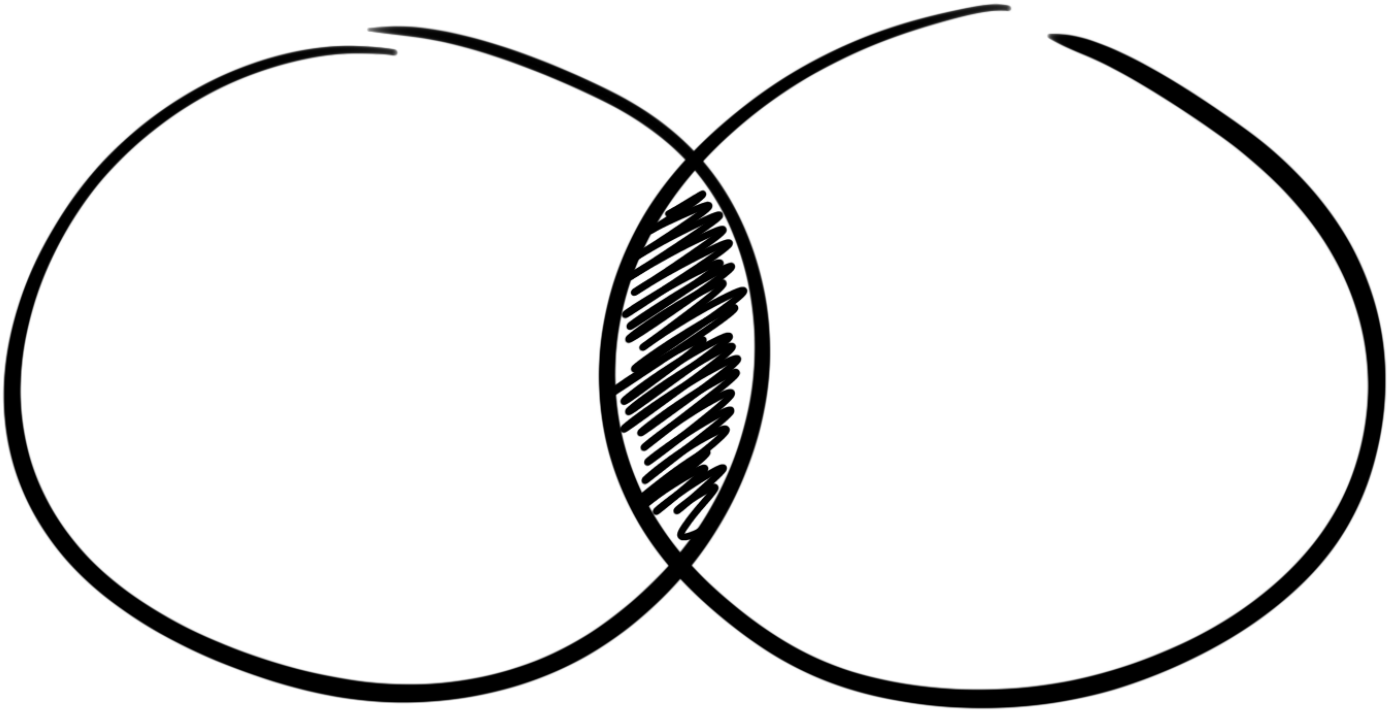
FINDING BALANCE



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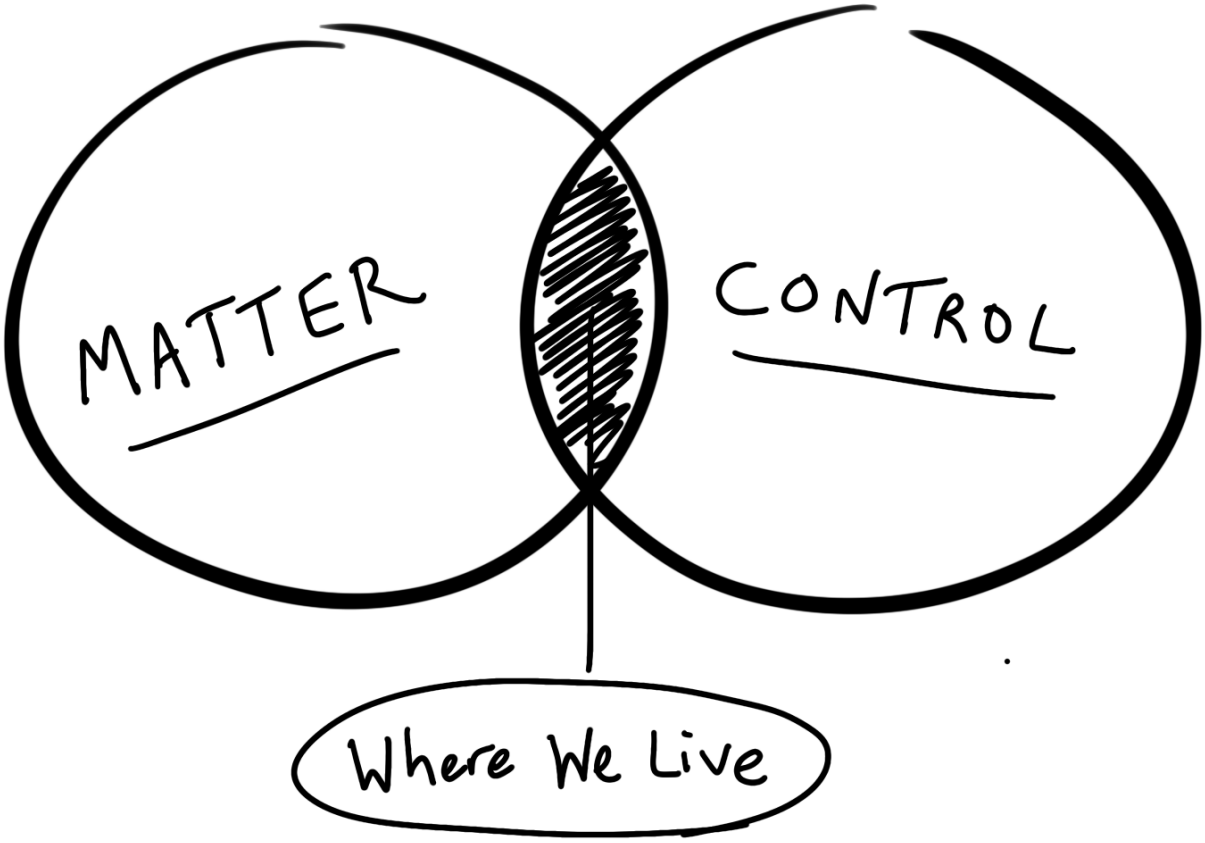
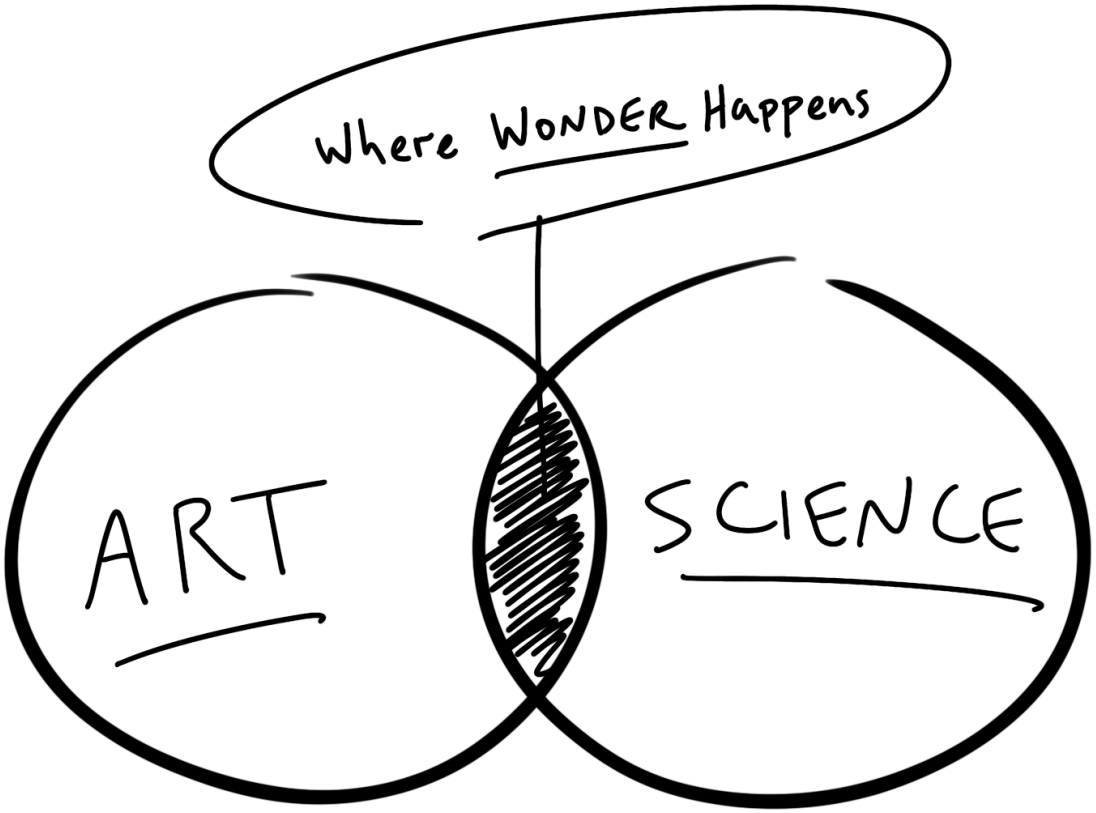


When it comes to finding balance in your life and achieving financial freedom, we separate two crucial elements: what **matters** to you and what you can **control**. Where these ideas merge is where Pickler Wealth Advisors can help you achieve great things.

WHERE ART AND SCIENCE MEET

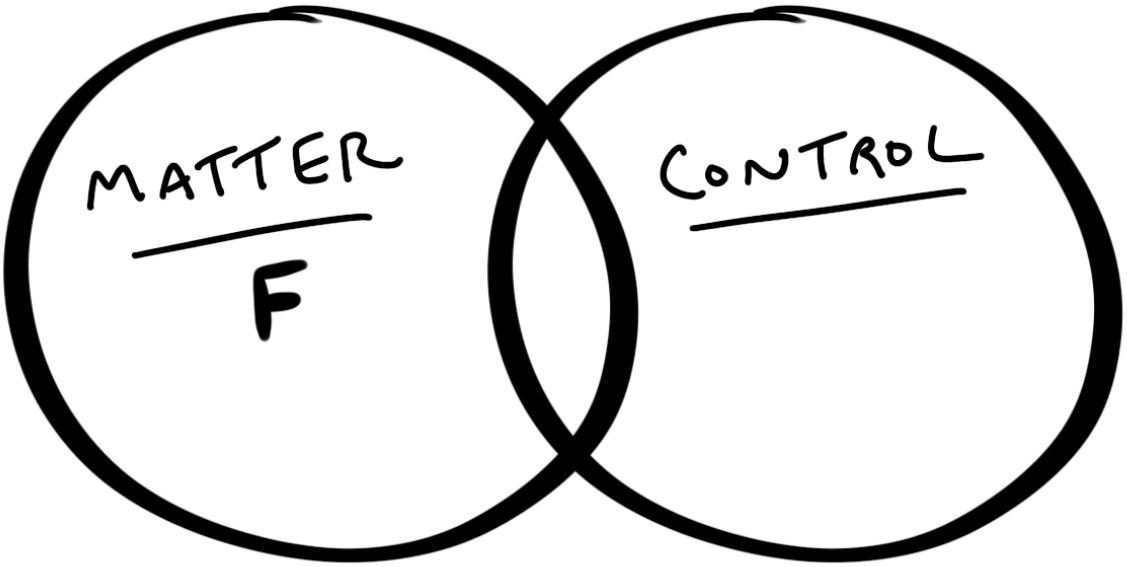
Pickler Wealth Advisors uses a **Goals-Based Wealth Management Process** that is unique in the industry. Merging Art and Science, we incorporate Discovery, Design, and Plan Deployment to help you better see a complete picture of your financial life. In tandem with this process, we utilize personalized advice and intellectual capital to solve your problems and make your goals a reality.



At the intersection of Art and Science lies magic and wonder. The beauty of our **Wealth Management Advisor Process** is that it ensures we never lose sight of the two essential elements necessary to achieve financial independence.

THE F.O.R.M. SYSTEM

Pickler Wealth Advisors incorporates the **F.O.R.M. System**, a tool devised to break down the four important areas of a client's financial life. Consisting of family, occupation, recreation, and money, we work alongside clients to map out each sector which helps both of us understand their dreams. This tool is one of the ways we help clients achieve a work-optional lifestyle so that they can focus on enjoying life instead of worrying about the future.

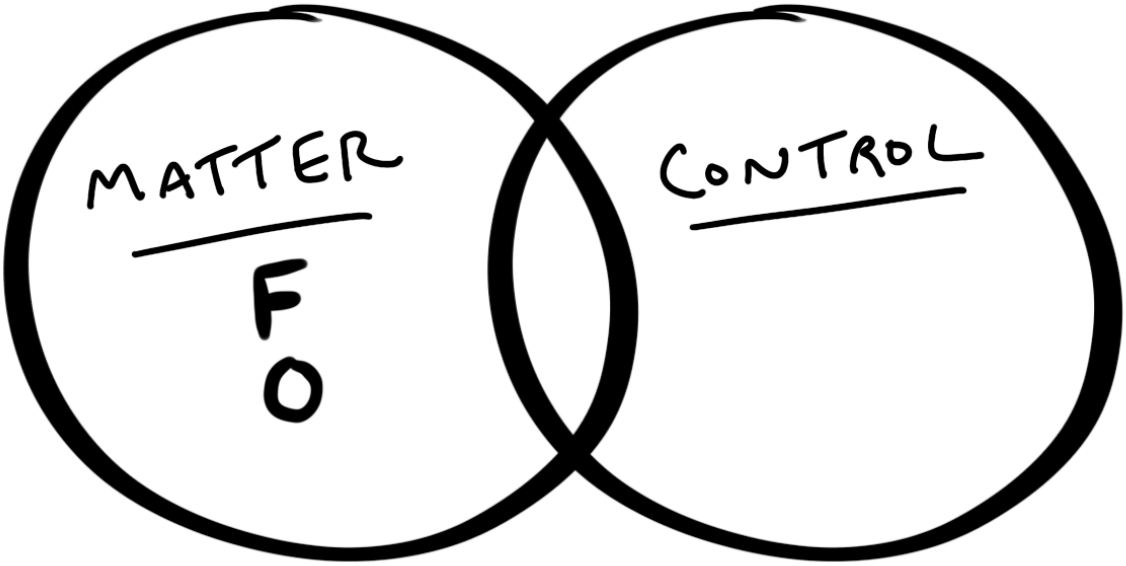


FAMILY

Consistently, family is the number one aspect of a person's life. We never lose sight of the importance of making sure your family is taken care of for the future.

This process ensures that we never lose sight of the essential elements to achieve financial independence!

THE F.O.R.M. SYSTEM



FAMILY	Consistently, family is the number one aspect of a person's life. We never lose sight of the importance of making sure your family is taken care of for the future.
OCCUPATION	Do you aspire to live a work-optional life or do you want to retire completely? When developing your life plan and financial strategy, we take this goal into consideration.

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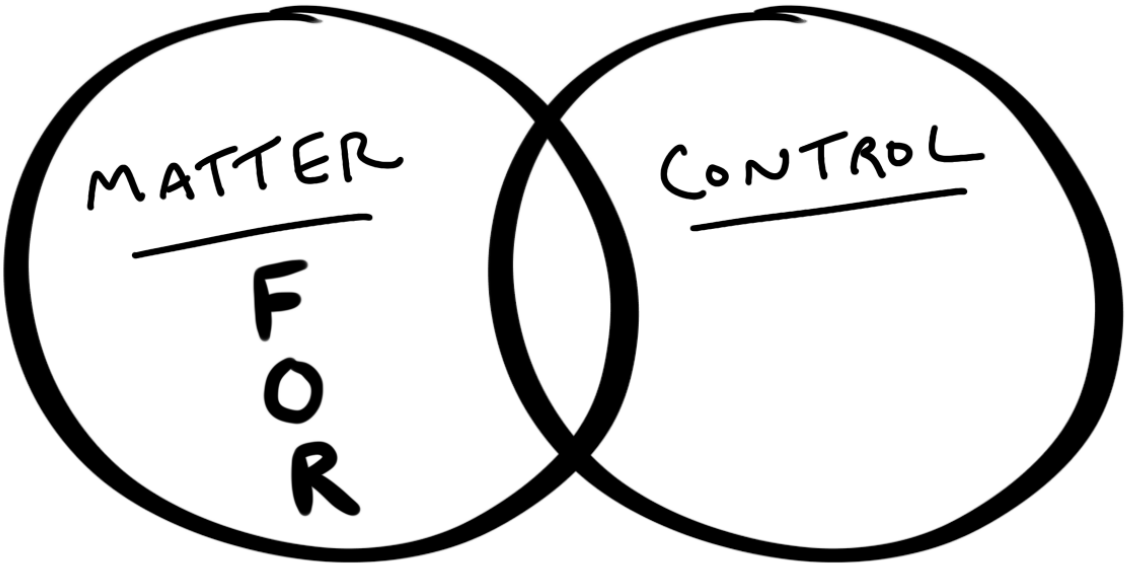

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RECREATION	What items "make the cut" for the Bucket List you've been dreaming of? Recreation and enjoying life outside of work plays an important role in telling your story!

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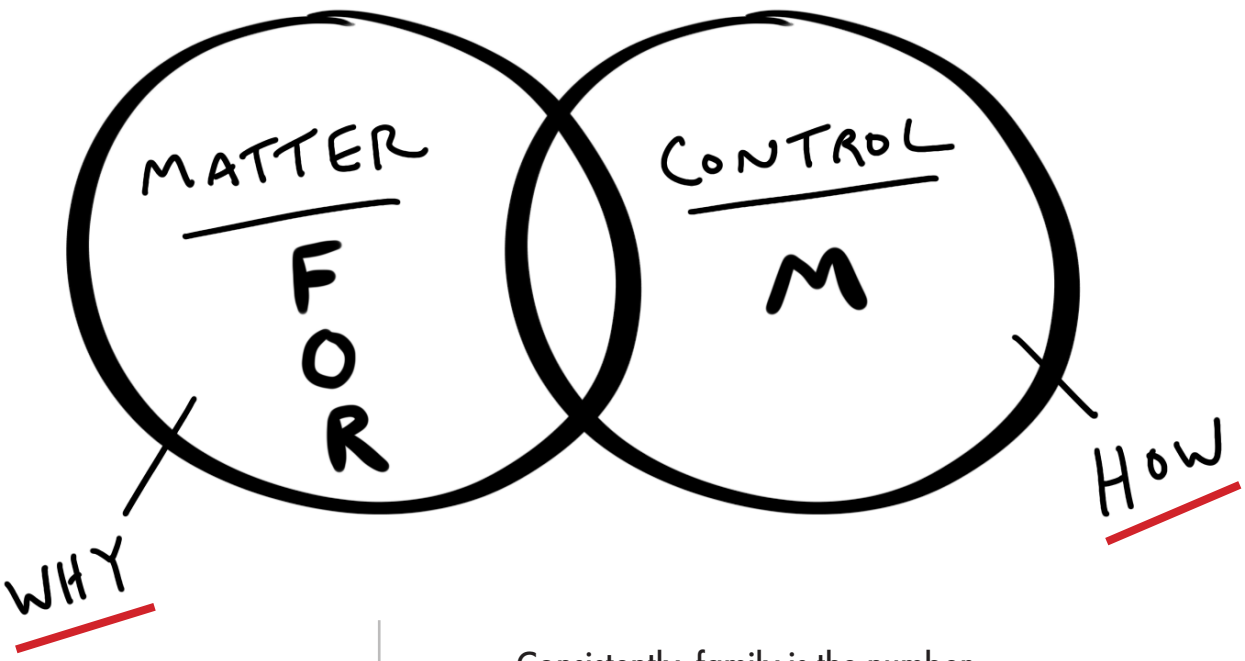

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RECREATION	What items "make the cut" for the Bucket List you've been dreaming of? Recreation and enjoying life outside of work plays an important role in telling your story!
MONEY	Money drives most everything we do in life. It determines how you take care of your loved ones and how you live. Our goal is to become indispensable for you and your family.

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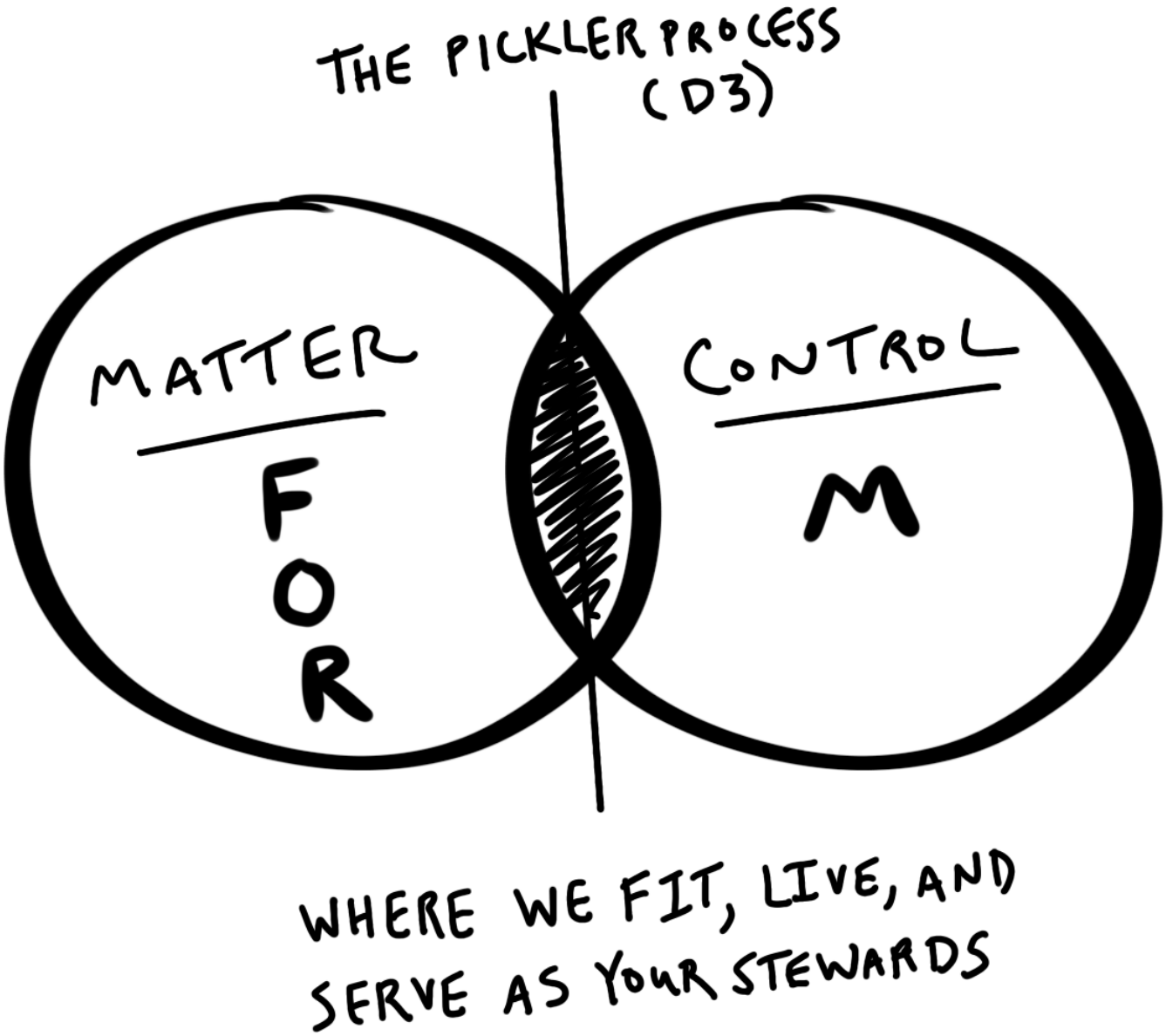
BRINGING IT ALL TOGETHER



PICKLER
WEALTH ADVISORS

THE PICKLER PROCESS

The Art & Science of Wealth Management

We provide goals-based wealth management, personalized advice, and intellectual capital to solve your problems.

ART

DISCOVER

UNDERSTAND

You have unique passions and goals, and Pickler Wealth Advisors is committed to learning about you and what is important to you and your family.

We want to develop a clear understanding of your family, your interests, and your passions because that helps us create a customized wealth management solution that will help you achieve your life goals.

ANALYZE

You worked hard to earn and build your wealth. We use all of the many tools at our disposal to analyze your family needs, current financial situation, investment experience, risk tolerance, and time horizon.

> **AT THE INTERSECTION OF ART AND SCIENCE LIES MAGIC AND WONDER WHERE WE HELP EMPOWER YOUR DREAMS TO REALITY**

SCIENCE

DESIGN

PLAN

We have comprehensive planning tools that allow us to use your personal financial data and our understanding of your needs to design a customized plan for you. We will build a plan that places your assets in investment vehicles that will best achieve your goals.

Your plan will include methods for wealth preservation and wealth transfer. We will preserve your assets by minimizing income tax exposure, balancing your liquidity needs with portfolio growth through active portfolio management, providing thorough analysis of health and long-term care insurance needs, and planning for future special needs.

A successful plan will also provide for a successful transfer of your wealth. Your plan will include estate planning recommendations, life insurance needs analysis, and estate tax planning. If you are a business owner, you must consider your business succession plan. Do you have one? We provide solutions that include business succession planning, family trusts for transfer of your assets, and philanthropic and charitable gifting wishes.

DEPLOY

IMPLEMENT

Your plan will incorporate specific strategies that will be integral to converting your plan design into action.

MONITOR

Perhaps the most important part of our advisory process is a commitment to ongoing monitor and review. As your life and markets change, so too must your plans. Our disciplined process of systematic review will provide the greatest opportunity for planning success and achieving your live goals.

A REFRESHER ON OUR 3'S

3 A's	**Assets, Attitude, Advocacy**	**The Ideal Client**
3 D's	**Discover, Design, Deploy**	**Our Planning Process**
3 R's	**Retain, Refer, Replicate**	**Our Marketing Approach**

OUR MESSAGE

Our process puts together all of the pieces of the financial puzzle as life unfolds and needs evolve. We stay true to an enlightened philosophy centered on achieving financial independence, and we use a personalized planning strategy that is designed to steer you toward a work-optional lifestyle. Along the way, ultimately, we want to help you slow life down, restore liberation and order, and ensure that you are enjoying the fruits of your work ethic and sense of purpose.

OUR UNIQUE VALUE PROPOSITION (UVP)

Our Family Delivering Solutions for Your Family.

OUR MISSION STATEMENT

Our mission is to make a profound difference in our world and in the lives of the clients we serve. We believe in giving back and paying forward with passion and purpose.