[LOGO]

ANNUAL VALUE SUMMARY

A summary of the planning, guidance and work completed on your behalf.

Prepared for	Date of Summary	Period Covered

YOUR GOALS — WHERE THEY STAND NOW

Goal You Shared	Status	Update & Next Step

WHAT WE DID FOR YOU THIS YEAR

Every action taken on your behalf — planning, tax efficiency, investment, coordination, service and the moments in between.

YOUR YEAR BY NUMBERS

Meetings Held	Calls & Emails	Plan Updates	Accounts Serviced

TAXES

INCOME

PLANNING

BEHAVIORAL COACHING

WHAT WE DID FOR YOU THIS YEAR (CONTINUED)

LOOKING AHEAD TO NEXT YEAR

Next year's goals _____

Upcoming milestones (retirement date, big purchase planned, etc.) _____

Other _____

PREPARED BY

Advisor Name _____ Title & Credentials _____

Phone _____ Email _____

The information provided on this form is kept strictly confidential and will not be copied, distributed or shared with any third party. Information gathered is solely for the purpose of better understanding your financial situation and to ensure your time with us is as efficient as possible. The asset values provided herein have been obtained from the above-named individuals or statements provided by the client.

[Investment Advisory Disclosure/BD Disclosure]