BRIAN VOSS

BRINGING CONFIDENCE & CLARITY TO YOUR FINANCIAL FUTURE

Brian A Voss

Helping to Secure Your Financial Future

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Our Mission:

Bringing **Confidence** and **Clarity** to your Financial Future.

You will benefit from our personalized, integrated approach to help **grow**, **protect**, and **transfer** your wealth.

Wealth Management is:

Setting **achievable goals** and then managing the process so that you always know

- Where you are **today**

- Where you are going in the **future**

- And that there is a **plan in place** that gives you a high probability of achieving your goals.

Team Members

Brian A Voss, Wealth Manager

Brian has spent **28 years** helping North Shore families through different phases of their financial lives across many market cycles. His value is in helping people make **deliberate decisions** about what may be the best phase of their lives. His passion is **mentoring** and **guiding** clients to their **vision of a successful future**.

Brian is a father of 5 and lives here in Winnetka. He has participated in Rotary since the early 60's. He is active in his Church, teaching money management classes, and professional study groups. He loves scuba diving, sailing and backpacking.

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Team Members

David Henningfield, Certified Financial Planner®, CPA

Dave brings **21 years** of experience in public and private **accounting**. His areas of experience include personal and corporate income **tax planning and preparation**, small business advising, and governmental and nonprofit accounting and auditing. Dave is a member of the Greater Lakes of Walworth County chapter of Business Network International.

Dave is married with 3 beautiful girls and enjoys bowling and responsible hunting and wetland conservation.

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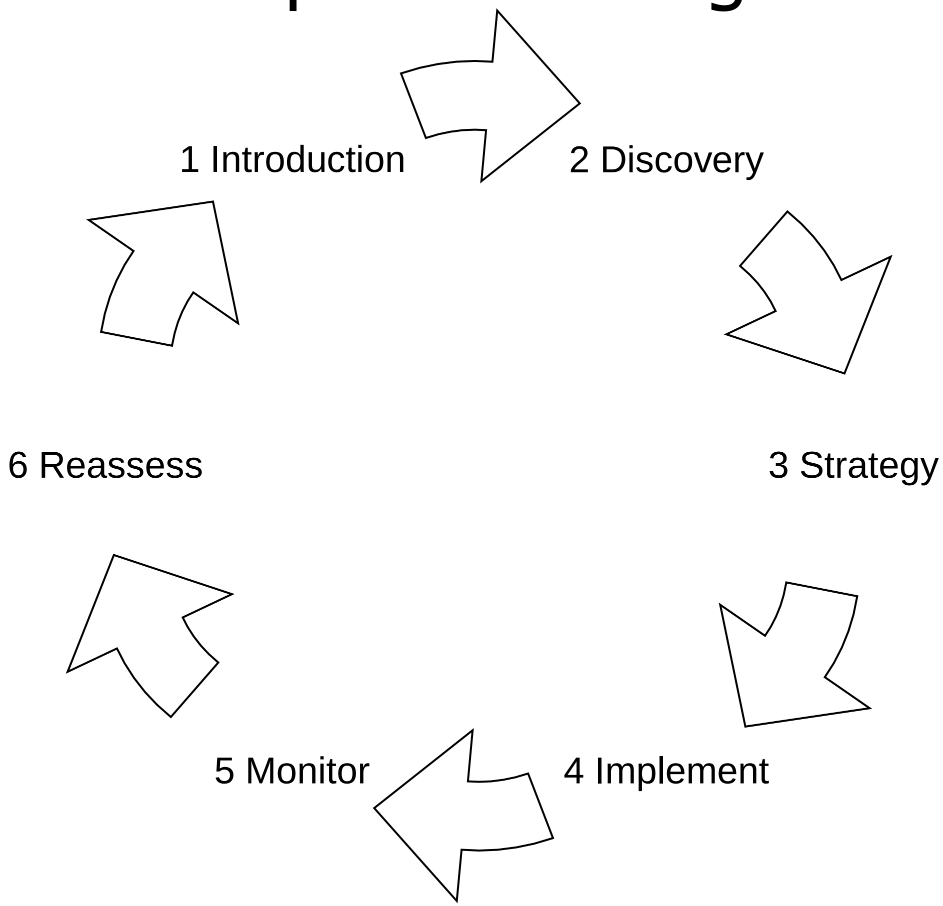
Our Signature 6 Step Consulting Process

Wealth Management

January	Investment Management & Financial Planning
April	Estate Planning
July	Risk Management & Insurance Planning
October	Tax Planning Cash Management



Behavior of Investing

- We work with you to uncover your Financial DNA; how your unique personality impacts your financial decisions.
- We offer financial behavior consulting strategies for delivering high financial life performance.
- We learn how to communicate our message to you so that you can be involved in the strategies.
- Spouses learn each other's financial behavior and appreciate their different strengths.

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Our Client Commitments

- Effective Communication
- Total Privacy
- Complete Objectivity
- Ongoing Monitoring

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Additional Client Benefits

We offer you:

- **Access to global financial resources** to meet your unique investment needs
- A team of **seasoned professionals to conduct in-depth analyses** of the financial strategies to benefit your wealth plan
- **Customized reports** that present your total financial picture

And most importantly,
Confidence and Clarity for your financial future.

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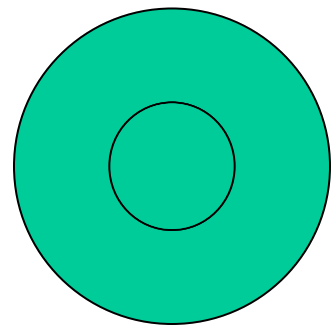
INVESTMENTS

EXISTING PORTFOLIO

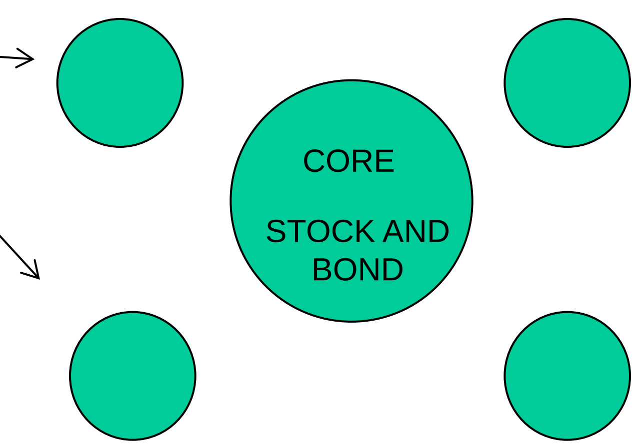
CORE
STOCK and
BOND



PROPOSED

SPECIAL SITUATION

- PRIVATE EQUITY
- HEDGE FUNDS
- MEZZANINE DEBT
- REAL ESTATE



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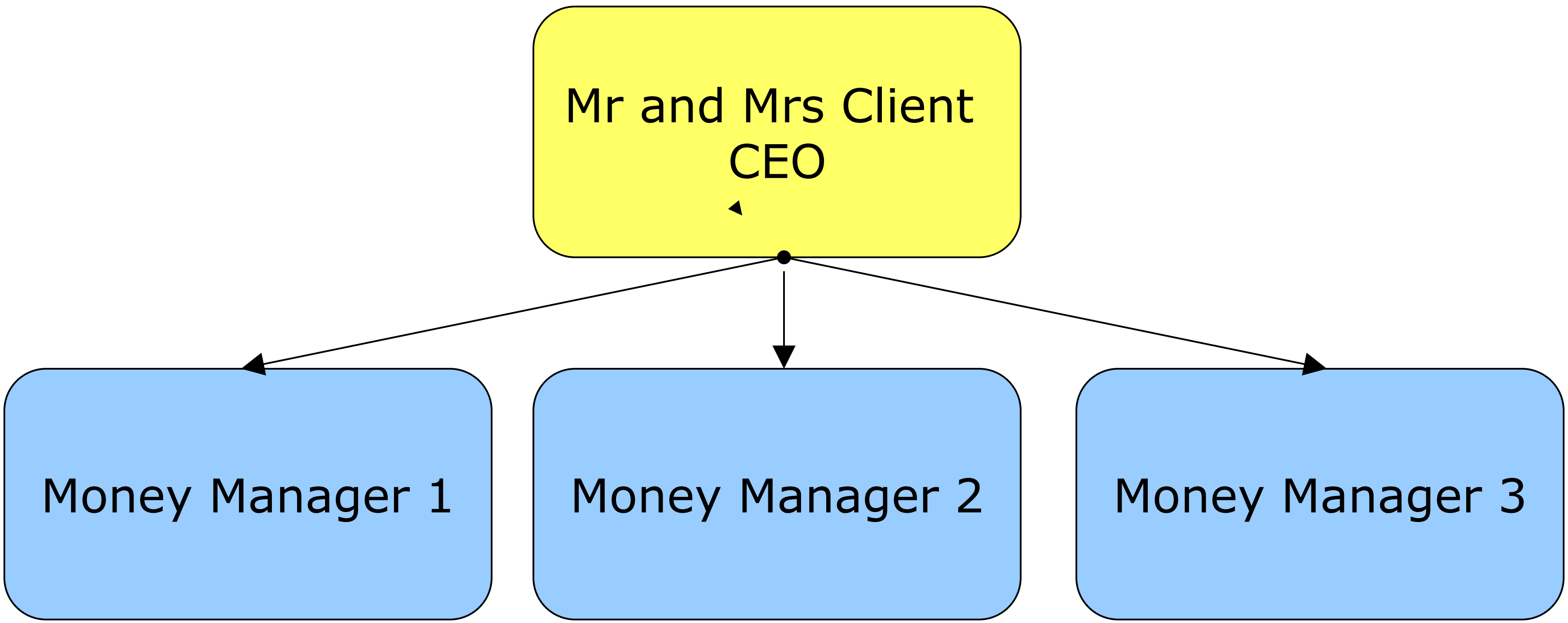
Sample Client Process



Investment Professional   Suitability Standard   Represents Company

Figure 1

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Our Client Process

Members:

1. Mr and Mrs Client
2. Brian Voss CFO
3. CPA/ Attorney

Mr and Mrs Client
CEO

Investment Committee

Investment Policy Statement

Brian Voss
CFO

Financial Advisor

Represents Client

Money Manager 1

Money Manager 2

Money Manager 3

Communication Gain Harvesting
Non Taxable Transfers Dividend Dodge

401(k)
Deferred Compensation
Stock Options
Concentrated Stock Positions
Alternative Investments

Figure 2