EDELMAN

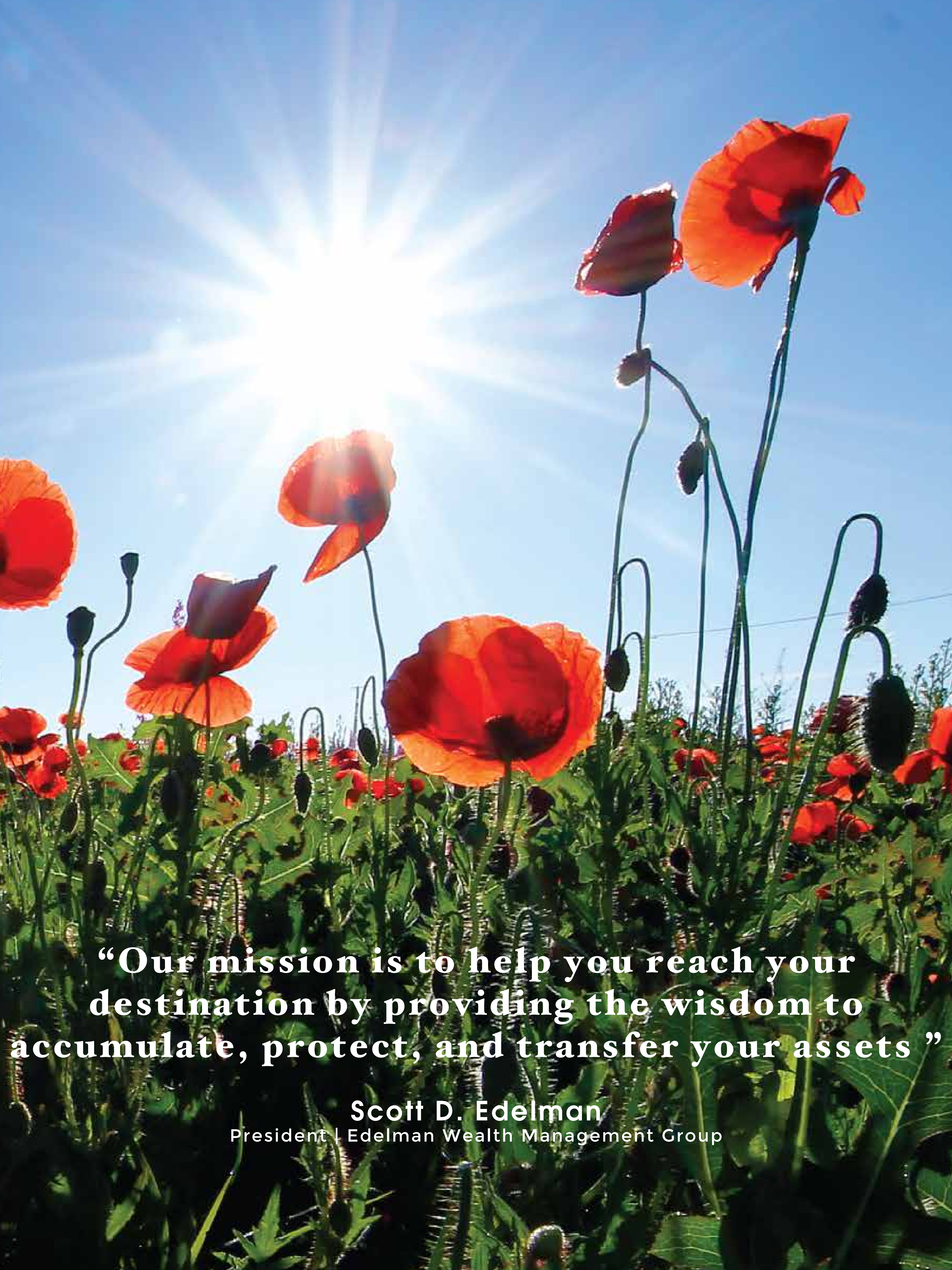
WEALTH MANAGEMENT GROUP

LET US HELP YOU REACH YOUR DESTINATION

destination

noun | des·ti·na·tion

1. the ultimate end or purpose for which something is created or a person is destined



"Our mission is to help you reach your destination by providing the wisdom to accumulate, protect, and transfer your assets "

Scott D. Edelman

President | Edelman Wealth Management Group

OUR STORY

Edelman Wealth Management Group was founded by Scott D. Edelman, who saw that people were not getting the advice they needed to feel secure in their financial future. Scott started his own firm in 1996 and focused on helping people feel that they could realize their lifestyle and financial goals.

Edelman Wealth Management Group was created with the idea that clients were family, not investment accounts. Individual stories mattered more than collective wealth.

Today the team provides personalized insurance and wealth management to clients around the nation.

INDIVIDUALS & BUSINESSES

Edelman Wealth Management Group guides both individuals and businesses.

INDIVIDUALS

- Build a Comprehensive Personal Roadmap
- Grow Your Assets to Follow Your Dreams
- Protect Your Family & Provide for Their Future
- Retire Not Just Comfortably, but in Style

BUSINESSES

- Safeguard Your Employees' Health
- Provide for Your Employees' Retirement
- Plan for Your Company's Future
- Attract & Compensate Talent

1

IDENTIFY YOUR GOALS

No one is alike. Your goals are unique to you as are the challenges that may be in your path. Talk to us about what you would like to achieve.

INVESTMENTS
+
INSURANCE

MANAGE YOUR RISKS

Insuring against risk is a vital part of wealth management that not many advisors address. We work with the leading carriers to make sure that you are being quoted the most competitive rates for the most comprehensive coverage. But most importantly, we make sure that the insurance you pay for compliments the wealth you are managing.

2

3

ADAPT TO YOUR CHANGING SITUATION

Life changes. Your wealth management strategy should change with it. Let us be there with you in those moments.

- Have kids? Talk to us about college planning
- Have a new job? We can discuss options for your 401(k)
- Thinking of retiring? Work with us to make sure you are prepared

You could ask the internet, but are you sure you know the right questions to ask?

ADVOCATE FOR YOU

You are not on your own. We are here to answer every question, address every fear, and celebrate every milestone. We can help you understand why you might not want to accelerate retirement distributions or why it might be a good idea to take control of your social capital.

Don’t know what social capital is? That’s why we’re here.

4

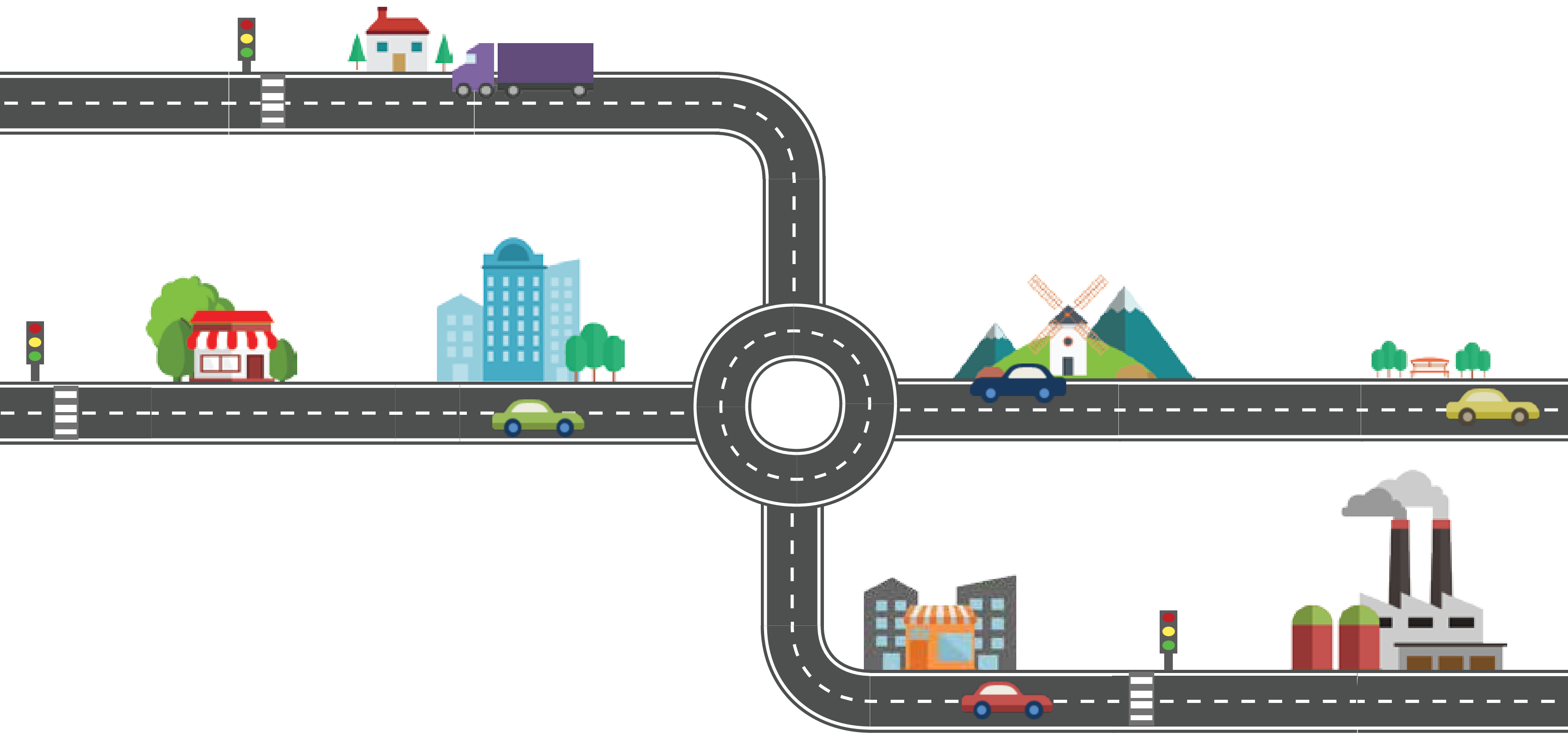
5

REACH YOUR FINANCIAL DESTINATION

The journey is just as important as the destination. Learn more about what it means to have a Financial Destination and how we can help guide your journey to it.

WHAT’S YOUR FINANCIAL DESTINATION?

Life is complicated and the paths you could take are endless.



We can't promise that we can make your life less complicated, but we can help make your financial decisions simpler. Let us help you identify what your goals are and create a roadmap for reaching them by managing both investments and risks.

FINANCIAL NEEDS ANALYSIS

Education Funding
Section 529 College Savings Plans
Disability Income & Life Insurance Needs Analysis
Long-Term Care Insurance Needs Analysis

RETIREMENT FUNDING

Pension Maximization
Qualified Distribution Analysis
Income Needs Analysis

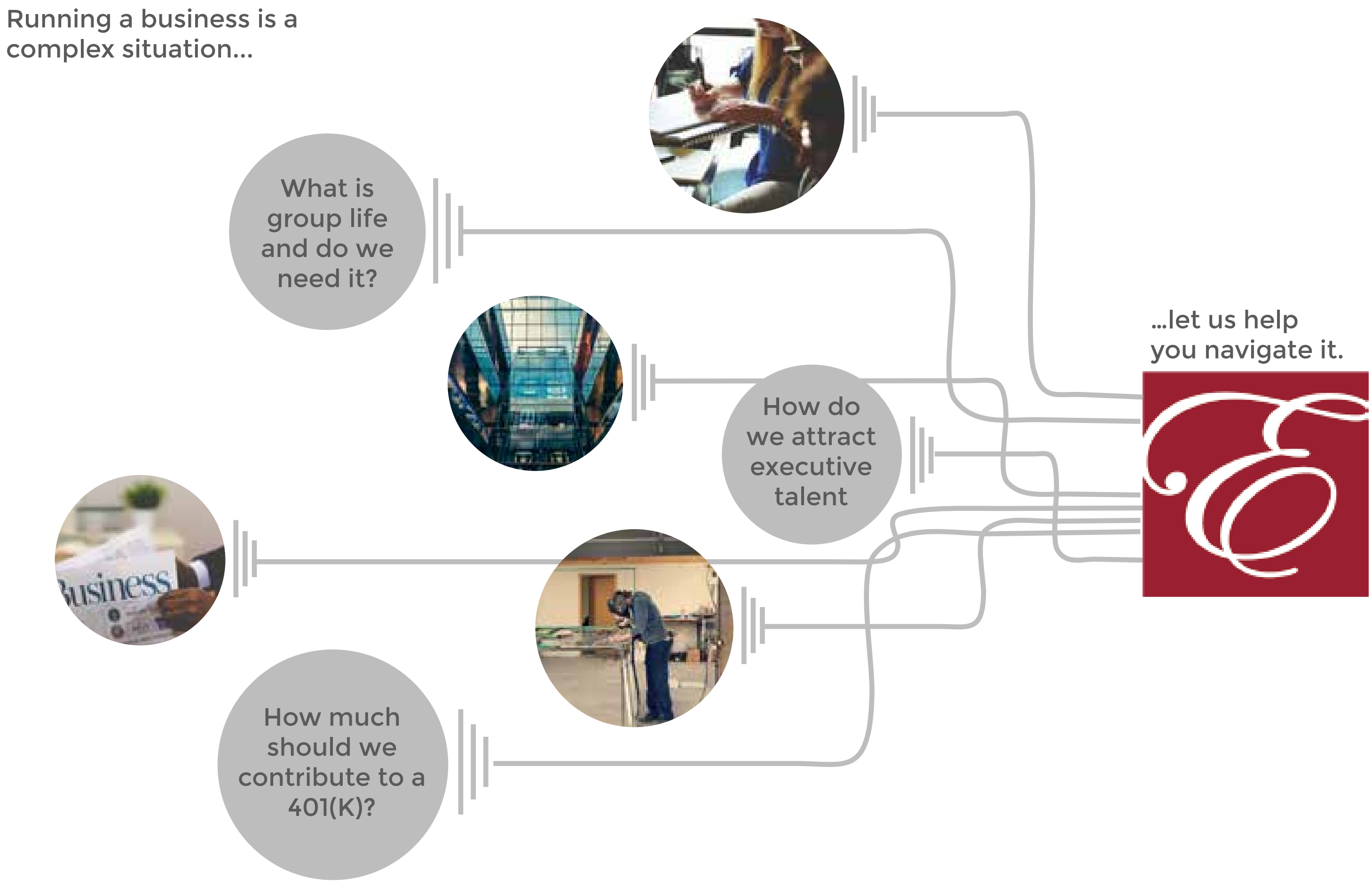
INVESTMENT PLANNING

Analysis of Risk Tolerance
Asset Allocation/Portfolio Construction
Manager Research/Monitoring

ESTATE CONSERVATION

Estate Tax Calculation
Estate Transfer Techniques
Estate Planning Strategies

As an owner or manager of a business, there are a lot of competing responsibilities pulling you in different directions. Let us manage some of those responsibilities. We can help you protect your employees and provide for their future.



EMPLOYEE BENEFITS

Dental & Vision Plans
Short and Long-Term Disability
Group Life/AD&D
Group Medical & Health Plans
Provider Network Evaluation and Selection
Utilization & Cost Comparisons
Full Selection of Voluntary Benefits

QUALIFIED RETIREMENT PLANS

Qualified Pension & Profit Sharing Plans
SEP IRAs
Simple IRAs
401(k) Plans
Qualified Plan Analysis

BUSINESS SUCCESSION PLANS

Buy/Sell
Key Person Indemnification
Family Equalization Techniques

EXECUTIVE COMPENSATION PLANS

Section 162 Bonus Plans
Deferred Compensation
Split Dollar Funding

Where do you want to be next year? How about in 5 years, or 10, or 20? We can help you identify your goals and create a holistic risk and asset management plan to guide you to those short and long-term goals.

LET US HELP YOU REACH YOUR DESTINATION

START HERE: HOLISTIC PLANNING

We are not your typical financial firm. We think outside the box and have the ability to help you with all aspects of your life.

UNDERSTANDABLE RECOMMENDATIONS

We understand your needs and deliver on a customized, easy to understand roadmap.

PERSONAL ADVOCATES

Our service team is with you every step of the way. We advocate for you and your best interests.

RESPONSIVE MANAGEMENT

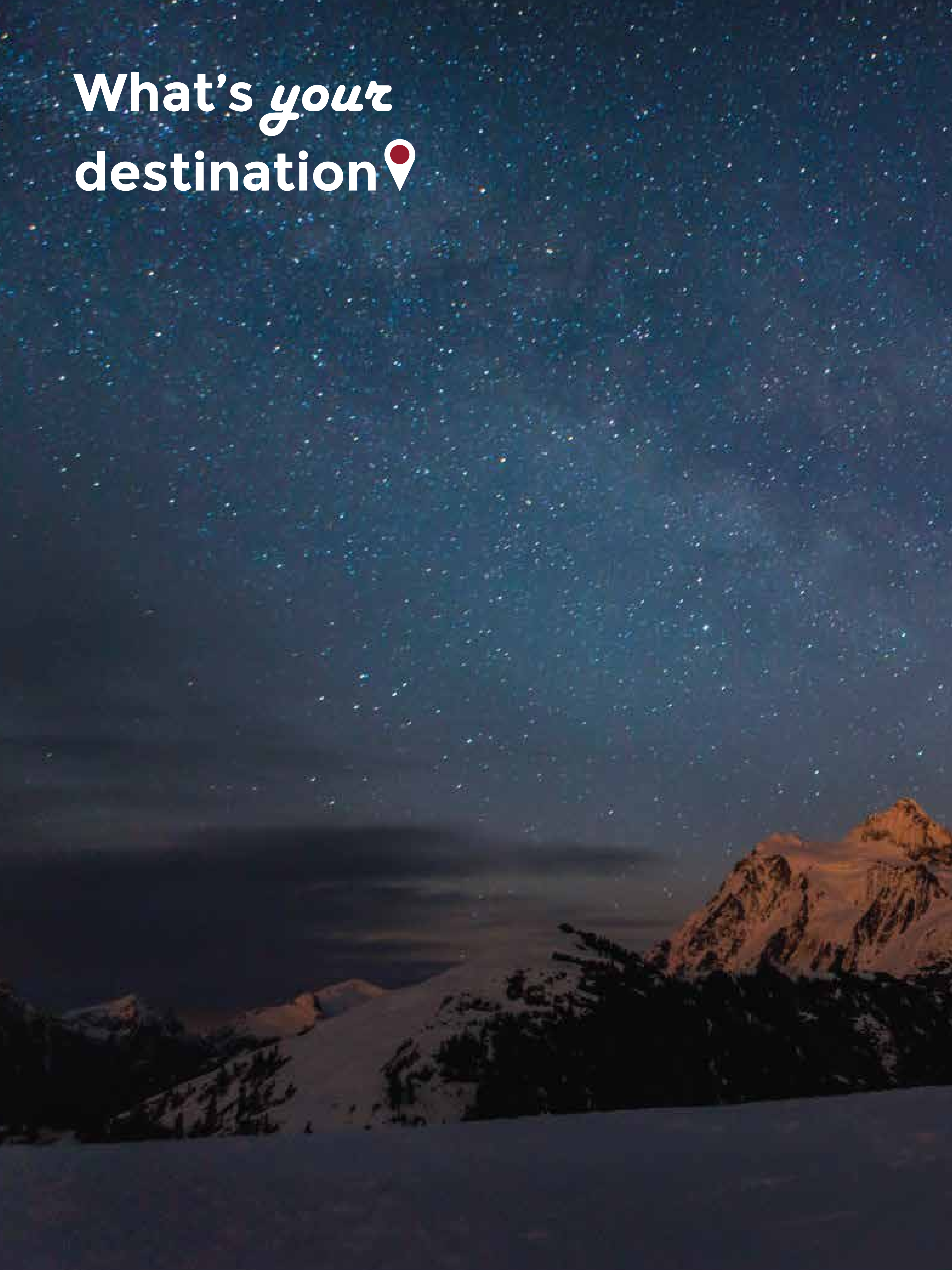
We guide and educate. We respond to unexpected events and help you adjust your financial plan.

DESTINATION REACHED

We have the right team to help you achieve your goals.

START HERE: WHAT ARE YOUR GOALS?

What's *your* destination



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