TREECE FINANCIAL GROUP INC

About Treece Financial Group

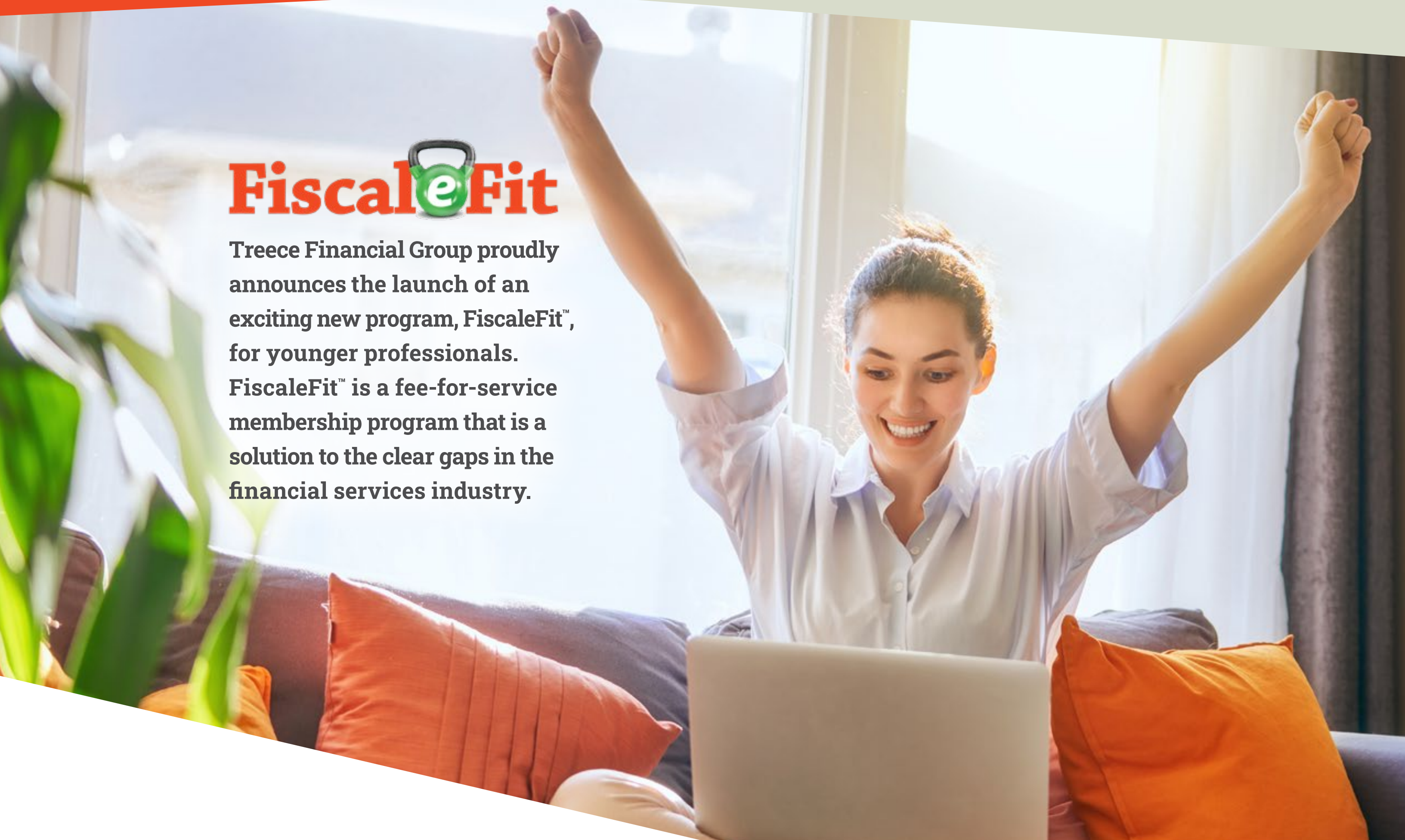
Led by David Treece, Treece Financial Group (TFG) is a full-service, fee-based, fiduciary financial planning and investment advisory firm based in Miami, Florida. Treece Financial Group takes a holistic approach to planning, and is dedicated to all aspects of a client's financial health, and not just managing investments. Treece has 30 years of financial planning experience. **Treece Financial Group** manages tens of millions of dollars in assets at any given time. Treece has been featured in *The Miami Herald*, *Sun-Sentinel*, PBS's *Nightly Business Report*, *The Washington Post*, and on NBC6 in an Emmy-award winning series about his work.

The Miami Herald

South Florida SunSentinel

The Washington Post

NBR Produced by CNBC



FiscaleFit

Treece Financial Group proudly announces the launch of an exciting new program, FiscaleFit™, for younger professionals. FiscaleFit™ is a fee-for-service membership program that is a solution to the clear gaps in the financial services industry.

What is FiscaleFit™?

Many young professionals, often referred to as "Henrys" (high earning, not rich yet), are not being served by the financial services industry because they do not have enough assets to meet the minimums of most firms. These young professionals are also wary of the traditional industry because of fees, lack of personal attention, and low trust. Many want more control, but they still want a trusted financial professional as a coach. FiscaleFit™ is a breakthrough, comprehensive custom program that meets their needs.

FiscaleFit™ is an innovative fee-for-service tool bundle that Treece Financial Group (TFG) administers. By registering for the one-year, free trial at www.treecefinancialgroup.com, clients get access to the **same brand name financial planning and investment tools, software, and databases that are usually only affordable to high net worth clients.** Through FiscaleFit™, these tools are now available to everyone because unlike its competitors, **TFG does not require assets under management or a minimum balance to use them.** This revolutionary, new program also includes personalized coaching utilizing David Treece's 30 years of financial investment experience.

Who should use FiscaleFit™?

FiscaleFit's™ customers are generally 30 to 49-year-olds who are employed and are high earners, or have their own businesses. They are learning-oriented and want to become CFOs of their own investments to reduce fees, avoid conflicts of interest, and directly control their assets.

Normally, the entire package would cost over $9,000 annually, without counting an advisor's fees.

FiscaleFit™ Pricing

With $9,000 in investment tools, FiscaleFit™ is free for 1 year from sign-up. Once the year is up, FiscaleFit™ subscribers pay $25 a month to continue leveraging the best investment tools in the business, with the ability to cancel at any time. Clients pay through AdvicePay, under the auspices of Cetera Advisors, so it is fully regulated and compliant.

What you get in FiscaleFit™:

AdviceWorks: A financial platform where a member can store all their credit cards, account information and downloadable files in one place

Everplans: Your own personalized dashboard to create your personal plan with "To Do Lists," checklists, and guidance broken out in sections: "My Life", "Health, Medical", "Financial", "Legal", "Eldercare", and "After I'm Gone"

MoneyGuidePro: What the professionals use to build financial plans

401(k) Optimizer: Web-based tool designed to help you manage your company-sponsored retirement plan while keeping your assets within the plan

Financial Library: A large and growing number of articles, short educational videos, planning guides, blog posts, and webinars, etc., and invitations to live webinars on timely topics

Upgrade to FiscaleFit™ Go Pro

To get a more comprehensive approach to investing and retirement, there is FiscaleFit™ Go Pro, which also includes all the tools in FiscaleFit™.

FiscaleFit™ Go Pro is priced at only $150 a month**. Payment is made through AdvicePay****, included in your software tools bundle, and can be cancelled at any time.

What you get in FiscaleFit™ Go Pro:

Your Portfolio Snapshot using Morningstar: Analysis of your holdings including risk vs. reward breakdown

Retirement Analyzer Income Planning Software: Projections of your savings and investments to get you on the road to retirement

Social Security Calculator Report: Analysis of Social Security profile to maximize benefits

20 VectorVest Stock Reports per Quarter :*** Stock review and portfolio management system that analyzes, ranks and graphs over 19,000 stocks each day for value with clear buy, sell or hold rating

20 Morningstar Reports per Quarter:*** The financial industry's lead independent research on mutual funds and exchange-traded funds

Quarterly Personalized Ongoing Financial Coaching: 1-hour free consultation per quarter from one-of-two top financial advisors, at Top-Rated Treece Financial Group, to prepare personalized financial plans and reports for you*

* *Additional consulting hours are at a discounted cost of $150 per hour*

** *FiscaleFit™ Go Pro membership fee is only $150 per month, with the first quarter (3 months) payable upfront*

*** *Not cumulative*

**** *Clients pay through AdvicePay, under the auspices of Cetera Advisors, so it is fully regulated and compliant*

For more information on Treece Financial Group, FiscaleFit™ or interviewing David Treece as a Financial expert email:

publicity@davidtreece.com

FiscaleFit

Meet the FiscaleFit™ Team

DAVID TREECE | CEO, TFG

With nearly 30 years of experience, David Treece works as a fee-based investment advisor representative who is also an Accredited Investment Fiduciary (AIF®) and is an Investment Advisor Representative with Cetera Advisors. David is highly-experienced in retirement planning and can advise on investments, insurance, income planning, tax planning, beneficiaries, emergency document retrieval, information security, estate planning, issues related to health and wellness, aging in place, and senior well-being. David works closely with clients to evaluate alternative, adaptive strategies that reduce risk and achieve their financial goals. Treece holds Series 6, 22, 52 62, 63, and 65 securities registrations, as well as life, health, and annuity insurance licenses. Treece is fluent in Spanish and has an MBA from the University of Michigan, Ann Arbor.

ROBERT WROBLEWSKI | BUSINESS DEVELOPMENT MANAGER, TFG

Robert has been a member of the TFG team since 2015. He holds Series 6, 7, 63, and 65 securities registrations with Cetera Advisors and has been in the financial services industry since graduating from Saint Anselm College in 2005. Robert is a Candidate for CFP® Certification, holds the Accredited Investment Fiduciary® (AIF®) designation and is an Investment Advisor Representative. He is a Mortgage Loan Officer in Florida and been volunteering preparing taxes for 5 years in association with Catalyst Miami.

Robert works directly with clients and alongside David to complete financial plans. He is experienced in creating comprehensive financial plans that can be centered around specific goals or a broader financial picture. He analyzes clients' needs, and researches and recommends suitable products

DAVID TRAUPMAN | MARKETING DIRECTOR, TFG

David Traupman brings almost 30 years of experience in design, copywriting, marketing, branding, direct response, and publishing in the service of the insurance, financial services, and healthcare industries, as well as non-profit organizations. He generates market research, outreach, and visibility to ensure TFG and FiscaleFit™ communicates key messages effectively and consistently. Originally from Philadelphia, PA, David has lived in South Florida for over a decade and has established deep connections within the greater Miami community, including with The Beacon Council, the Greater Miami Shores Chamber of Commerce, Keller Williams Realty Miami, SAVE, and the Miami-Dade Gay & Lesbian Chamber of Commerce. He received a BA in Art History from Temple University in Philadelphia and is the president of David Traupman Creative (DTC).

HARSHITA KALRA | CLIENT RELATIONS MANAGER, TFG

Harshita holds a bachelor's degree in Business from the University of Delhi and an MBA in Marketing from the National Institute of Management Solutions. She invests enthusiasm, hard work, and personalized service in everything she does. Harshita Kalra is responsible for office administration, special events, and marketing with a focus on growing the company and offering the highest quality service to clients.

Harshita is originally from India and lived in Copenhagen, Denmark, for three years before moving to Miami.

FiscaleFit