SHERPA FINANCIAL ADVISORS

Sherpa Financial Advisors
Family Review Service

Exclusively for friends, family and associates of our valued clients

In this challenging economy, you probably know a friend, family member or colleague who may be in a complex situation or just unhappy with the advice from his or her financial advisor—it's not uncommon. We believe that many high-net-worth investors would value a second opinion on their finances.

In order to help the people you care about achieve their financial goals, we have created a complimentary second-opinion service. We're pleased to offer your friends, family members and associates the same expertise and guidance that we believe you have come to expect as a valued client of Sherpa Financial Advisors.

Working with a collaborative team that redefines wealth management

Ask ten investors to define wealth management. You will almost certainly get ten different answers, with most heavily focused on investing. However, at Sherpa Financial Advisors, we work with a professional team, comprised of a CPA, estate attorney and insurance specialist. Because we believe these financial areas are interdependent, we use a comprehensive approach to wealth management and discuss high-level potential solutions based on our cooperative team discussion. Clients and Sherpa Financial Advisors are then able to further explore these suggestions together with the client's personal team of professional advisors.

Wealth Management

Investment Consulting	Advanced Planning	Relationship Management
• Asset allocation • Portfolio management • Manager due diligence • Risk evaluation • Performance analysis	• Wealth enhancement, including cash flow management and tax minimization • Wealth transfer • Wealth protection • Charitable giving	• Regularly scheduled calls, reviews and in-person meetings • Team of professionals, including legal, tax, insurance and investment advisors

Continues on reverse side

Our consultative process

We approach each new engagement with a consultative process. This allows us to have an open dialogue in which we learn about every client's values and goals while working with them to tailor a plan to help achieve them. As a valued client, you will recognize the five steps below as the process you have experienced with us. Through our second-opinion service, your friends, family members and associates can enjoy a portion of this experience at no cost.

Full client experience

Discovery Meeting → Investment Plan Meeting → Mutual Commitment Meeting → 45-Day Follow-up Meeting → Regular Progress Meetings

What to expect from our second-opinion service

We will meet with your friends, family members and associates for a Discovery Meeting. Assuming that we both agree that we have a basis for working together, they will return for an Investment Plan Meeting. During this second meeting, we will hopefully be able to confirm they are on track to fulfill their values and achieve their goals with their current financial provider. If needed, we will suggest ways in which we can help, including recommending another provider if we are not a good fit for their needs. Either way, they will receive a Total Client Profile and a personalized analysis of their current situation.

Family Review Service

Discovery Meeting → Investment Plan Meeting

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