Noble Birch Wealth Management's Second Opinion Service

Exclusively for family, friends, and associates of our valued clients

"We have experienced first-hand the value proactive wealth management has made in the lives of our clients. Our focus is to identify and rectify any financial blind spots so that you can pursue the goals you have always envisioned. We want you to enjoy the journey while progressing toward the destination…and we are with you every step of the way."

-Shawn Agan, CFP®, MBA

In this challenging economy, you probably know a family member, friend, or colleague who may be in a complex situation or just unhappy with the guidance from their financial advisor - it's not uncommon. It has been our experience that a large percentage of high net worth investors would value a second opinion.

In order to help the people you care about pursue their financial goals, we have created our complimentary **Second Opinion Service**. We're pleased to offer your family, friends, and associates some of the same experience and guidance that you've come to expect as a valued client of Noble Birch Wealth Management.

Working with a team that redefines wealth management

Ask ten investors to define wealth management. Actually, ask ten "wealth managers" to do so. You'll almost definitely get ten different answers, and most are likely to be heavily focused on only investing. As a client of Noble Birch Wealth Management, however, you benefit from a cutting-edge team that has a clear and comprehensive vision of wealth management.

Wealth Management

Investment Consulting

- Asset allocation
- Portfolio management
- Manager due diligence
- Risk evaluation
- Performance analysis

Advanced Planning

- Wealth enhancement, including cash flow, tax minimization, and liability management
- Wealth transfer
- Wealth Protection
- Charitable giving

Relationship Management

- Regularly scheduled strategy meetings, client education events, market updates, and special briefings
- We have access to an advanced team of experienced professionals, including legal, tax, insurance, and investment research analysts.

What to expect from the Second Opinion Service

We will meet with your family, friends, or associates for a discovery meeting and then invite them back for a wealth management plan meeting. Hopefully, we can confirm they're on track to meet their goals. If needed, we'll suggest ways in which we can help, including recommending someone else if we're not a good fit for their needs. Either way, they'll receive both a Total Client Profile and personalized analysis of their current situation.

Second Opinion Service

Discovery Meeting → Wealth Management Plan Meeting

Our full consultative process

We approach each new engagement with a time-tested, collaborative process. This allows us to have an open dialogue in which we learn about your values and goals while working with you to tailor a plan to help work toward them. As a valued client, you'll recognize each of the five steps below and we can offer a portion of our services, complimentary, to your family, friends, and associates.

Full client experience

Discovery Meeting → Wealth Management Plan Meeting → Mutual Commitment Meeting → Strategy Implementation Meeting → Regular Process Meetings

Let us help those you care about. Contact us today.

NOBLE BIRCH
WEALTH MANAGEMENT

5153 Utica Ridge Rd
Davenport, IA 52807
(563) 359-3475
www.noblebirch.com