



Investment Planning & Wealth Preservation  
SAUL WEALTH ADVISORS LLC



## Passionate, Personal, And Professional Helping You Get What You Want Out Of Life

You want a financial advisor who is as passionate about your dreams as you are, someone who will take the time to get to know you – not as just another account but someone who connects with you. At Saul Wealth Advisors, we build long-term relationships by working one-on-one with you to help discover and define your personal goals, and then we help you devise a plan to achieve those goals. You can rely on us to provide you with sensible solutions and straightforward answers on questions surrounding:

- Investment management, asset allocation and rebalancing
- Retirement fund accumulation and withdrawal strategies
- Wealth accumulation and preservation
- Tax minimization strategies\*
- Estate planning
- Long-Term Care insurance
- Life insurance

## Our Investment Philosophy Consistency, Commitment, And Research

At Saul Wealth Advisors, we are committed to providing you with access to a disciplined approach to asset management, supporting you with the structure needed to succeed. You can count on us to always:

**Focus on the long term:** Chasing returns is a formula for failure. With a clinical approach, the daily ups and downs of the markets are less likely to disturb you, much less influence your portfolio decisions.

**Diversify your investments:** The highly customized portfolio built for you will be designed using research and analytics. Your portfolio will be diversified across a broad spectrum of investment products that may include stocks, bonds, exchange-traded funds (ETFs), mutual funds and third party money managers depending on your personal goals.

**Maintain diligent oversight:** Markets change. Companies change. What may have been a good investment a year ago may no longer fit your investment needs. Together, we track the progress of your portfolio's performance toward reaching your investment goals, periodically rebalancing and making new recommendations. You can count on us to watch the markets and analyze how developments are affecting your portfolio.

\*Any discussion of taxes is for general informational purposes only, does not purport to be complete or cover every situation, and should not be construed as legal, tax or accounting advice. Clients should confer with their qualified legal, tax and accounting advisors as appropriate.



## A Process For Achieving Your Goals

### You'll Benefit From Our Prudent Process

Saul Wealth Advisors provides you a structure toward achieving financial success by establishing a process and committing to following it through:

- At our initial meeting, we get to know you, understand your concerns, and discuss your goals and aspirations.
- At our second meeting, we drill down into greater detail and ensure we understand your situation and resources.
- Solutions and recommendations are discussed in our third meeting and implemented when you are comfortable.
- Depending on your needs, we meet with you quarterly or annually to keep you on track. And of course, you can contact us at any time.

## We're Your Financial Team

### Executing Your Game Plan

Saul Wealth Advisors believes that the key to success lies in ongoing communication and constant evaluation of your goals and expectations. As a wealth advisory team with extensive resources and comprehensive investment models and strategies, we can keep you moving forward through every stage of your investment game plan. We will work closely with your outside advisors, including accountants and attorneys, to develop a team approach, making sure that every piece of your financial life is working together in one seamless package.

## Our Pledge To You

### Trust, Respect, Integrity

You can trust Saul Wealth Advisors to always be there when you need us, answering your questions and working with you in pursuit of your goals. Since service is all that we sell, you can count on us to:

- Treat you with respect, honesty, and integrity
- Work as your financial coach, providing you financial sense of comfort
- Educate you to ensure that you are comfortable with each of our recommendations
- Strive to exceed your expectations at every level of the relationship

# Why Saul Wealth Advisors

## An Educated Investor Is Our Best Client

As an investor, you can go anywhere for financial advice. Wall Street brokerages, giant insurance companies, and online discount brokers are vying for your business. But what type of firm should you trust? At Saul Wealth Advisors, we aspire to have only a limited number of clients and offer you service that is personal, private, and exclusive. We honor our relationship by providing client service and attention that you will not find elsewhere. Here's why Saul Wealth Advisors is the right choice:

- We are a local firm with deep roots in this community.
- We don't have a huge marketing budget and rely on introductions from our clients to grow our business, so we are directly motivated to please every client we serve.
- As an Investment Advisor Representative, we find solutions and make recommendations that are in your best interest, not ours.
- Our entire focus is on developing and managing a comprehensive financial strategy that meets your unique needs. We have no hidden agenda.
- You receive personal attention and advice from professionals who come to know you.

Securities and investment advisory services offered through qualified registered representatives of MSI Financial Services, Inc., to be merged with and known as MML Investors Services, LLC in March 2017. Members SIPC. Saul Wealth Advisors, LLC is not a subsidiary or affiliate of MSI Financial Services, Inc., MML Investors Services, LLC, or its affiliated companies. OSJ: Barnum Financial Group, 6 Corporate Drive, Shelton, CT 06484. (203) 513-6000. L0217489520[exp1217][CA,CT,FL,MA,NJ,NY,PA,TN]

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