



WealthPartners
PRESERVATION • GROWTH • LEGACY

2018 Annual Report



2018 Year in Review

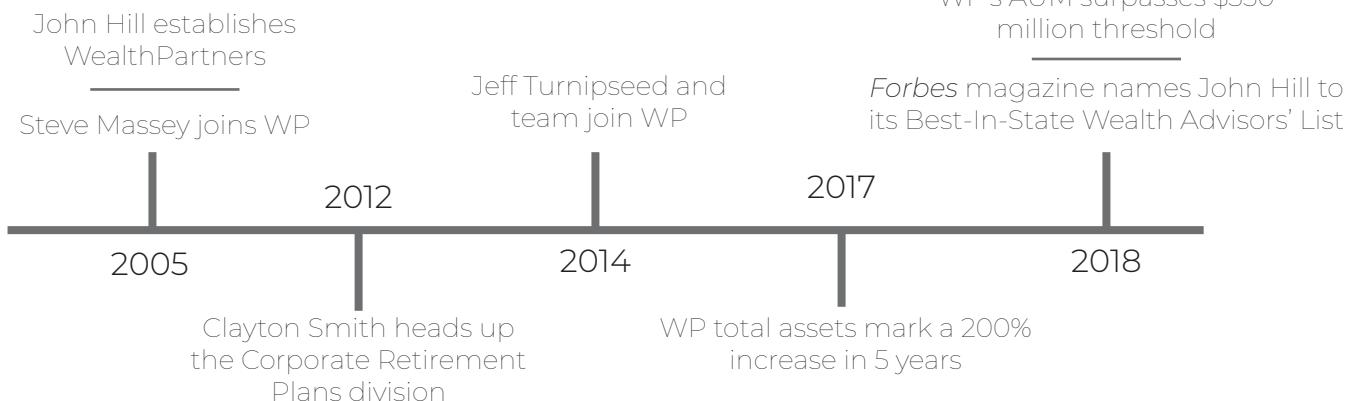
We consider our success by the results and satisfaction of our clients. In the last five years, WealthPartners maintained a 98% client retention rate and 98% over last year. We combined service, technology, and the talents of our people to provide our clients with useful analytics to help drive improvement towards their financial goals. We also have measured the amount of effort it takes to acquire a client, service their account, remain compliant, and maintain client relationships. What we found was while delivering on our mission we are guided by strong and meaningful relationships and values, including unwavering commitment to integrity.

Our staff clocked many hours and traveled thousands of miles as a commitment to continuing education, including training seminars, webinars, broker-dealer and vendor conferences, and study group meetings – all in an effort to fulfill the client's goals and achieve client satisfaction.

WealthPartners continuously invests in innovative methods and systems, allowing us to provide uniquely better service and products for our clients – driving our growth and efficiency. We reinforce and build on our operations and client experience each year. In 2018, we reached a \$350 million threshold in assets under management – an 11% increase over 2017.

Through responsible, sustainable business practices and our commitment to giving back, we contribute to the communities and markets where we live and work. We were able to donate to Stewpot, Batson Children's Hospital, and Goodwill Industries-Hurricane Relief.

It is our privilege to do business with you. We are grateful for your trust in WealthPartners and look forward to a prosperous and healthy 2019.



We stayed... Busy | In Touch | Secure | Engaged | Inspired

162

New accounts opened

31,514

Emails sent

19,069

Miles traveled by WP Team

3,910

Wintergreen Mints consumed

450+

Shredded pounds of paper converted to digital files

242,106

Scanned pages of documents

1,704

Cups of coffee and tea

952

Cash Disbursements

\$470,000,000 in in-force death benefit of life insurance policies



Designations

2018 Stats

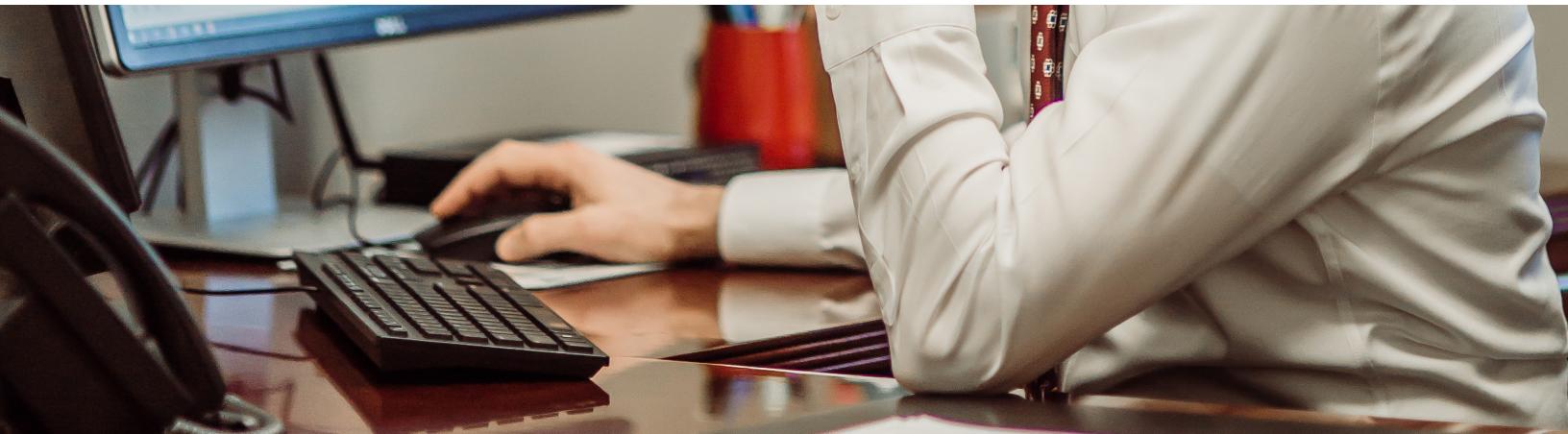
Past 5-year (annualized) % revenue growth	22%
Past 1-year (annualized) % revenue growth	16.51%
Past 5-year (annualized) % asset growth	9%
Past 1-year (annualized) % asset growth	10%
Client Retention Rate over last 5 years	98%
Client Retention Rate over last year	98%
Number of Households	350+

We Stayed On Top of Things

Investment Management

With WealthPartners' continued firm growth comes an evolving responsibility. Within investment management, a crucial part of that responsibility is advocating on behalf of our clients for practices that we believe enhance long-term returns. As part of the investment management team's duties, Steve Massey, Clayton Smith, John Hill, and Jeff Turnipseed dedicated more than 1,400 hours in client portfolio management.

We follow a thorough process focusing on the growth and management of your portfolio and monitor investment performance compared to investments in the same class. We actively manage and rebalance your portfolio to help reduce risk. The time we invest in these processes help with asset allocation decisions, investment selection, and portfolio implementation.



Independent Review of Investment Portfolios

Our portfolios have been reviewed by several large, well-respected Securities and Exchange Commission (SEC)-registered investment advisory firms. These third-party firms offer and evaluate strategies from fundamental and quantitative active management to indexing strategies that allow broad exposure to world capital markets. Each firm has specific expertise in risk mitigation techniques that are used as part of the investment management process of your portfolio.

Quarterly Investment Committee

The WealthPartners Investment Policy Committee is an internal forum comprised of our investment specialists, with collectively more than 100 years of financial experience.

We cover the topics of stocks, sectors, bonds, international investing, commodities, interest rates, and alternative investments among others – and the Q&A is lively. These meetings are valuable for shaping the strategies we use in managing your assets. They provide investment management ideas and analyses used to influence prioritizing firm initiatives, evaluating model/performance, discussing risk mitigation tools, and sharing best practices amongst similar advisory firms.

Our Team's Tenure

	Industry Years	Firm Years
John F. Hill, CFP®	32	13
Steve Massey, CFP®, CPA	31	13
Jeff Turnipseed, CPA	26	4
Clayton Smith, AIF®	14	5
Erin McCain	14	4
Tisha Koury	8	8
Melissa Craig	6	4

Due Diligence

Through our due diligence process, we consult directly with our portfolio managers to review strategies, performance, and market opportunities that require adjusting your current holdings and vetting new investments.



We Stayed Educated

We can say with confidence that we accomplished a great deal of educational preparedness for helping deliver great business acumen to clients. What you may not know is the amount of continuous effort we spend, making sure we remain up to date and gaining the best knowledge within all areas of our expertise to deliver successful results. We attend conferences, meetings, and webinars, and travel miles to learn as much as we can to take you to the level of service you expect from WealthPartners.

659
hours of
continuing ed,
conferences, &
training



Corporate Retirement Plans Division

In 2018, Clayton Smith logged more than 13,000 miles on the road to advise corporate retirement plan clients. In all, he spent 400 hours researching and learning to help your plan remain regulatory-compliant, and to help keep your participants educated on their 401(k) plan. One goal is to have a retirement plan that motivates employees to reach their retirement goals – while also helping you and your organization benefit both from retirement and tax-advantaged scenarios.

Our focus within the Corporate Retirement Plans division is to provide the platforms, design, support, and execution for your goals. Doing our job right, while doing it well, takes a constant commitment to learning, creative-thinking, and an on-going pursuit of knowledge. While acting in the best interest of each company and its plan participants, continuing education is part of our day-to-day activities.



Our ongoing investment in innovation enables us to provide better service and products for our clients and drive efficiency and growth

2018 Operations and Client Experience

- **Staff Assessment Tool.** Performed team personality and behavioral assessments among all employees to improve work productivity, teamwork and communications, helping us continue to build and improve our organization.
- **Risk Assessment Software.** Implemented a new risk assessment software that allows us to better quantitatively identify the risk for client portfolios and when they are outside of their defined risk preference.
- **Client-Accessible Technology.** Implemented an enhanced client portal and wealth planning solutions that improved and made for more efficient software integration with current clients. It provides clients on-demand access to their financial picture in one place to monitor account activity, track progress toward financial goals, and evaluate spending.

2019 Business Initiatives

- Evaluate and partner with an independent investment manager and strategist firm for research, market analytics, investment solutions, and risk mitigation.
- Upsurge client use of the eMoney tool that performs goals-based or cash-flow planning, stores documents in the client portal, and monitors the progress of the overall plan towards meeting client goals.



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