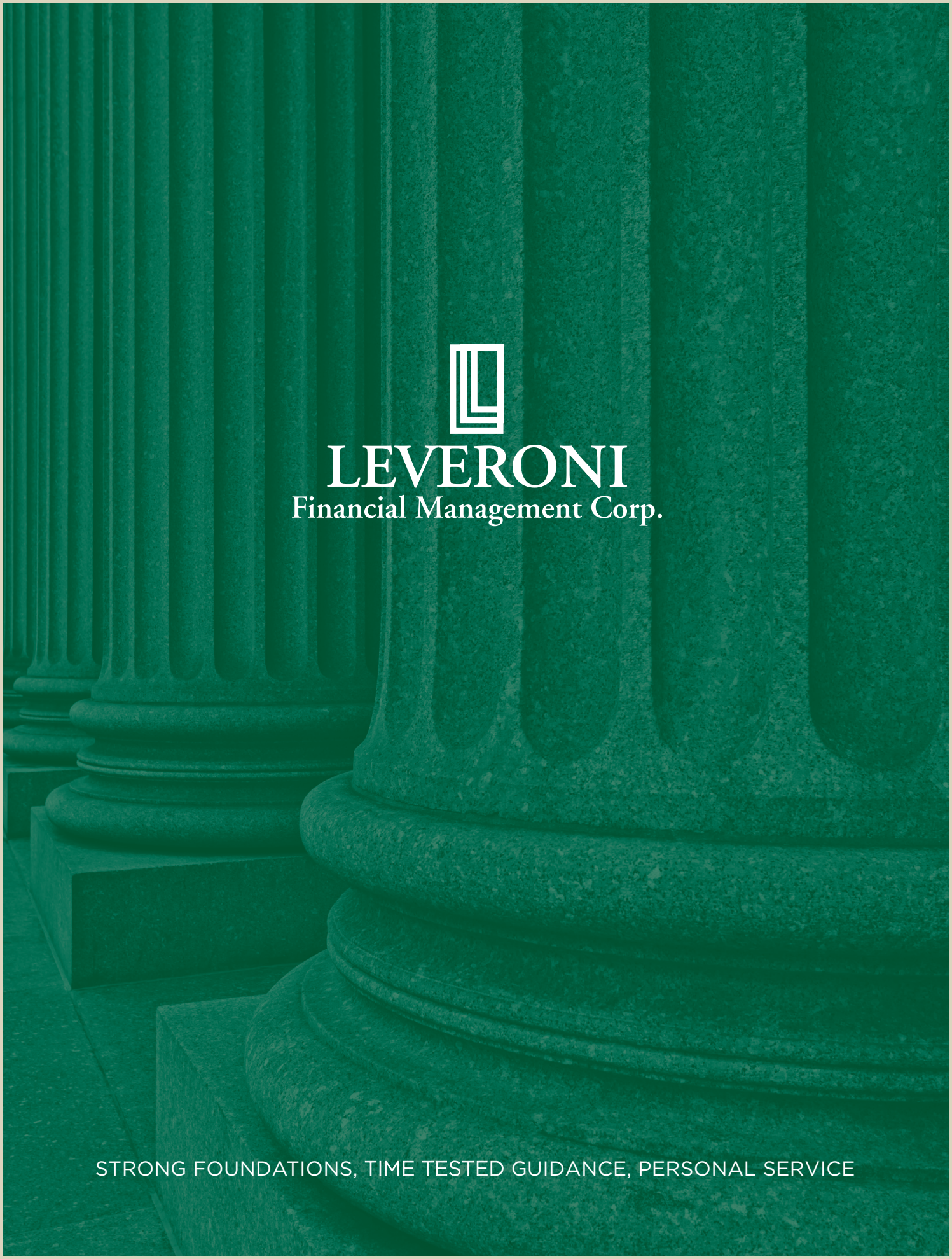
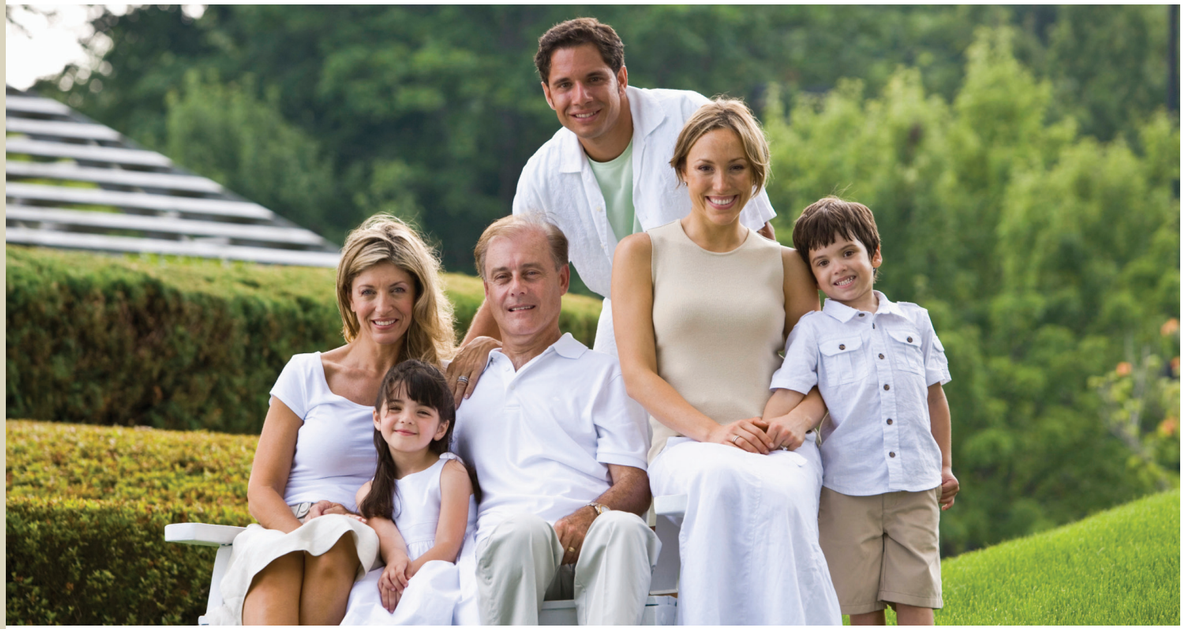

LEVERONI
Financial Management Corp.
STRONG FOUNDATIONS, TIME TESTED GUIDANCE, PERSONAL SERVICE

For You and Your Family



Since 1959, the Leveroni family has offered clients a caring environment where their interests come first. Leveroni Financial Management specializes in assisting individuals, families and business owners with attaining their vision of financial security and the comfort it brings.

As financial advisors, we, the Leveroni family, are now in our third generation of service and commitment to our clients. It is our duty to assist you in pursuing a more secure financial future. We help you assess your financial security needs and then address those needs using a wide range of products and services from which you can make choices that feel right to you. In addition, we give you action steps and guidelines that set you on the right path toward the fulfillment of your financial goals. When new questions arise, we are committed to providing suitable solutions that give you the freedom to focus on and protect what is important to you. As your personal advisors, we are here to keep you on track toward reaching those goals and securing a brighter future.

As your partner for success, Leveroni Financial Management requires an in-depth analysis of your needs and goals as part of a fundamental process for creating a written plan just for you. Our dedication to the client experience includes the following core principles:

STRONG FOUNDATIONS:

Creating a comprehensive financial plan for you lays a strong foundation that will be used to guide every recommendation and decision throughout our relationship. We set up the guidelines and fill in the details for each stage of your life. A well constructed plan conceived through the synchronized efforts of you and all your advisors is the cornerstone to your financial well-being.

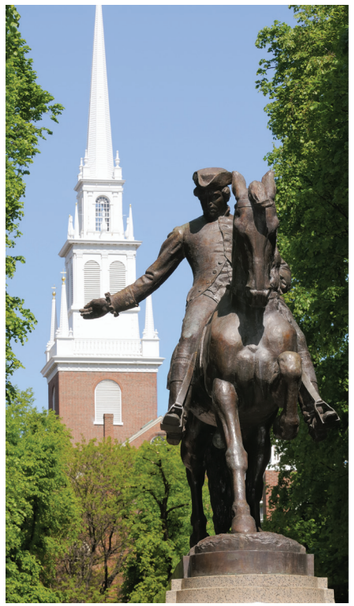
TIME TESTED GUIDANCE:

Equipped with your financial roadmap, we regularly review your financial situation and make appropriate recommendations as needed. We keep your plan current and viable in light of the ever-changing economic trends, tax law climate and changes in your personal life. Additionally, we proactively keep you apprised of new opportunities that may arise from changes favorable to your situation.

PERSONAL SERVICE:

Our team approach to client affairs assures timely personal response and attention to your needs through ongoing collaboration among our team members. Your team is here to answer questions, address concerns, take instructions, advise and guide you. These supportive services are always executed with your financial roadmap and personalized goals in mind.

Planning for Life's Challenges is the Key to Your Success

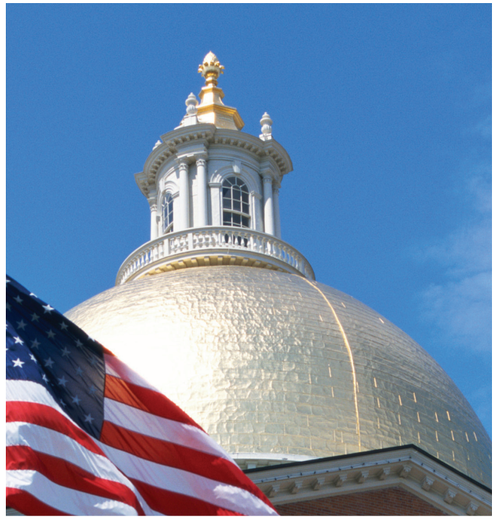


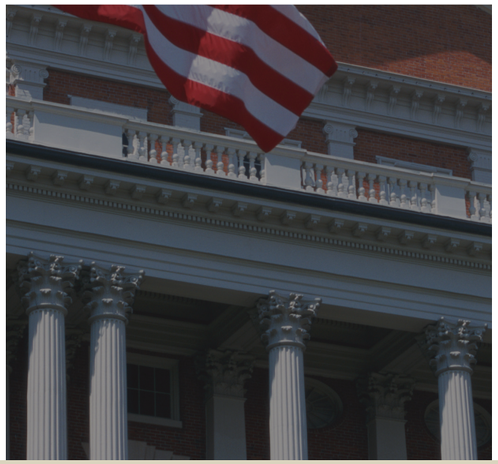
Take charge of your financial future

Creating and following your formalized financial plan with our ongoing guidance, monitoring and supportive services will make approaching important milestones in your life a cause for celebration, not anxiety. These milestones may include an early or comfortable retirement, maintaining a certain lifestyle, caring for and protecting your family, educating your children and grandchildren, leaving your loved ones a legacy, or just living life on your terms. Achievement of your goals is no mistake, but rather the result of careful planning, expert guidance, and consistent supervision.

A GUIDING PROCESS:

We first lay the foundation of your financial "road map" by developing a formalized and comprehensive overview of your current financial health. This is a process accomplished by gathering and organizing your financial data, prioritizing your goals, identifying any issues and coordinating with your other advisors, such as your CPA and attorney, to ensure plan accuracy and completeness. If you need a referral to an attorney or CPA, we are able to provide them. We then customize your plan consisting of our observations, analysis, recommendations and your feedback. The implementation of our recommendations and ongoing monitoring to keep you on track is all part of having a comprehensive and cohesive financial plan. This clarifies your goals, sets parameters and also reduces or eliminates wasteful overlaps, conflicts and omissions in planning for your future.





COMPREHENSIVE SERVICES:

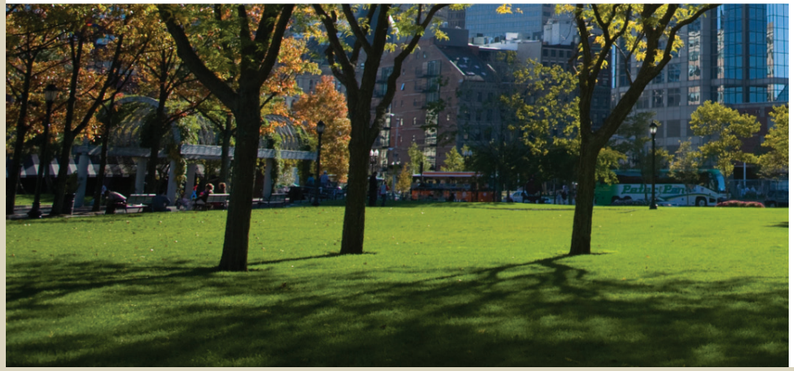
We offer a full range of financial services and strategies to lead you toward financial independence.

- Comprehensive Financial Planning
- Portfolio Management
- Business Strategies
- Insurance
- Education Planning
- Retirement Planning
- Annuities
- Long-Term Care Planning
- Estate Planning
- Trust Services

ENDURING INVESTMENT PHILOSOPHY:

Our investment management discipline seeks to reduce portfolio volatility and risk, while capturing asset appreciation. This is accomplished by building a well-diversified, actively-managed portfolio of global assets—stocks, bonds, annuities and alternative investments. Alternative investments may include precious metals, commodities and income-producing real estate investment trusts (REIT's), structured to suit your life stage, goals and risk tolerance.

Caring for and protecting your family...for generations



...Living Life on Your Terms

FROM OUR FAMILY TO YOURS:

Our family's multi-generational dedication to the caring and success of our clients' aspirations has been a very rewarding experience. We not only enjoy and benefit from assisting our clients throughout their journey, but we have also experienced the benefits firsthand by taking our own financial planning advice. We are wedded to our process, philosophy and team approach because it has served our clients well for decades.

Let us help you pursue your financial goals by:

- Protecting your family with income in case of your untimely passing or disability
- Brightening your children's future by funding their college education
- Providing the freedom to live and/or retire on your terms.

And when it's time to seek elder-care planning and/or get your final affairs in order, knowing you have us to help you address these issues with personalized solutions is very comforting.

INDEPENDENCE POWERED BY LPL FINANCIAL:

We are associated with LPL Financial, the nation's largest independent broker/dealer.* This relationship provides us with industry-leading, objective research and a comprehensive array of tools, resources and technology.

* As reported by *Financial Planning* magazine, June 1996–2017, based on total revenue.

- Stocks and bonds strategies involve risks including the loss of principal. Alternative investment strategies carry a higher degree of risk. Annuity guarantees are based on the claims paying ability of the issuing company.
- There is no guarantee that a diversified portfolio will enhance overall returns or outperform a non--diversified portfolio. Diversification does not protect against market risk.

Your vision, our experience

LEVERONI
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