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At Freedom Wealth Management, you will receive financial guidance and a partner in your financial journey. We commit to providing you with the financial tools necessary to help provide you freedom to excel in your personal and professional life.

What can you expect from our initial meeting? At this discovery meeting, we will:

- Perform a comprehensive review of your current budget situation and assess your financial goals.
- Guide you on preparing a monthly, written budget and a comprehensive financial plan.
- Provide education regarding your current and proposed investment options.

What can you expect from committing to a relationship? Freedom Wealth Management will:

- Offer support for your investments based on your risk tolerance.
- Guide you through the maze of government rules with regards to account types, tax strategies, investments, contributions and withdrawals, etc.
- Proactively review your financial plan on an annual basis to ensure the products we are providing align with both your goals and risk level.

How much can I anticipate the costs or fees to be?

- Fees are tiered based on the portfolio size that you have invested with us. The standard fee schedule starts at 1.5% annually, and decreases as your asset level increases.
- We feel strongly about becoming your partner in this journey and will be present with you to understand any such fees associated with your account. Common transaction charges, such as Trades, ACH transfers and EFT's are absorbed by our firm.

How can we achieve the greatest success together? Simply by committing to:

- Meeting with your advisor no less than annually to review the products and services that you participate in. Freedom Wealth Management's staff will contact clients to schedule this. However, we anticipate life events, such as loss of employment, divorce or even death will occur. In these instances, it is important that you contact us for support.
- Engage with and listen to the expertise of our advisors. We want all our clients to make an informed decision, even if that result is choosing a difference path than our advisor laid out.
- Agreeing that either party may terminate the partnership without penalty but with written notice of a minimum of five business days to the other party.

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