

EDELMAN  
WEALTH MANAGEMENT GROUP

LET US HELP YOU REACH YOUR DESTINATION

# destination

noun | des·ti·na·tion

1. the ultimate end or purpose for which something is created or a person is destined





A low-angle photograph of a field of red poppies. The sun is high in the sky, creating a strong lens flare that radiates across the upper half of the image. The poppies are in various stages of bloom, with some fully open and others as buds. The green stems and leaves of the plants are visible in the foreground and middle ground.

**“Our mission is to help you reach your destination by providing the wisdom to accumulate, protect, and transfer your assets ”**

**Scott D. Edelman**  
President | Edelman Wealth Management Group

## OUR STORY

Edelman Wealth Management Group was founded by Scott D. Edelman, who saw that people were not getting the advice they needed to feel secure in their financial future. Scott started his own firm in 1996 and focused on helping people feel that they could realize their lifestyle and financial goals.

Edelman Wealth Management Group was created with the idea that clients were family, not investment accounts. Individual stories mattered more than collective wealth.

Today the team provides personalized insurance and wealth management to clients around the nation.



## INDIVIDUALS & BUSINESSES

Edelman Wealth Management Group guides both individuals and businesses.

### INDIVIDUALS

- Build a Comprehensive Personal Roadmap
- Grow Your Assets to Follow Your Dreams
- Protect Your Family & Provide for Their Future
- Retire Not Just Comfortably, but in Style



### BUSINESSES

- Safeguard Your Employees' Health
- Provide for Your Employees' Retirement
- Plan for Your Company's Future
- Attract & Compensate Talent





## 1 IDENTIFY YOUR GOALS

No one is alike. Your goals are unique to you as are the challenges that may be in your path. Talk to us about what you would like to achieve.

## INVESTMENTS + INSURANCE

## MANAGE YOUR RISKS

Insuring against risk is a vital part of wealth management that not many advisors address. We work with the leading carriers to make sure that you are being quoted the most competitive rates for the most comprehensive coverage. But most importantly, we make sure that the insurance you pay for compliments the wealth you are managing.

# 2

## 3 ADAPT TO YOUR CHANGING SITUATION

Life changes. Your wealth management strategy should change with it. Let us be there with you in those moments.

- Have kids? Talk to us about college planning
- Have a new job? We can discuss options for your 401(k)
- Thinking of retiring? Work with us to make sure you are prepared

**You could ask the internet, but are you sure you know the right questions to ask?**

## ADVOCATE FOR YOU

You are not on your own. We are here to answer every question, address every fear, and celebrate every milestone. We can help you understand why you might not want to accelerate retirement distributions or why it might be a good idea to take control of your social capital.

Don't know what social capital is?  
That's why we're here.

# 4

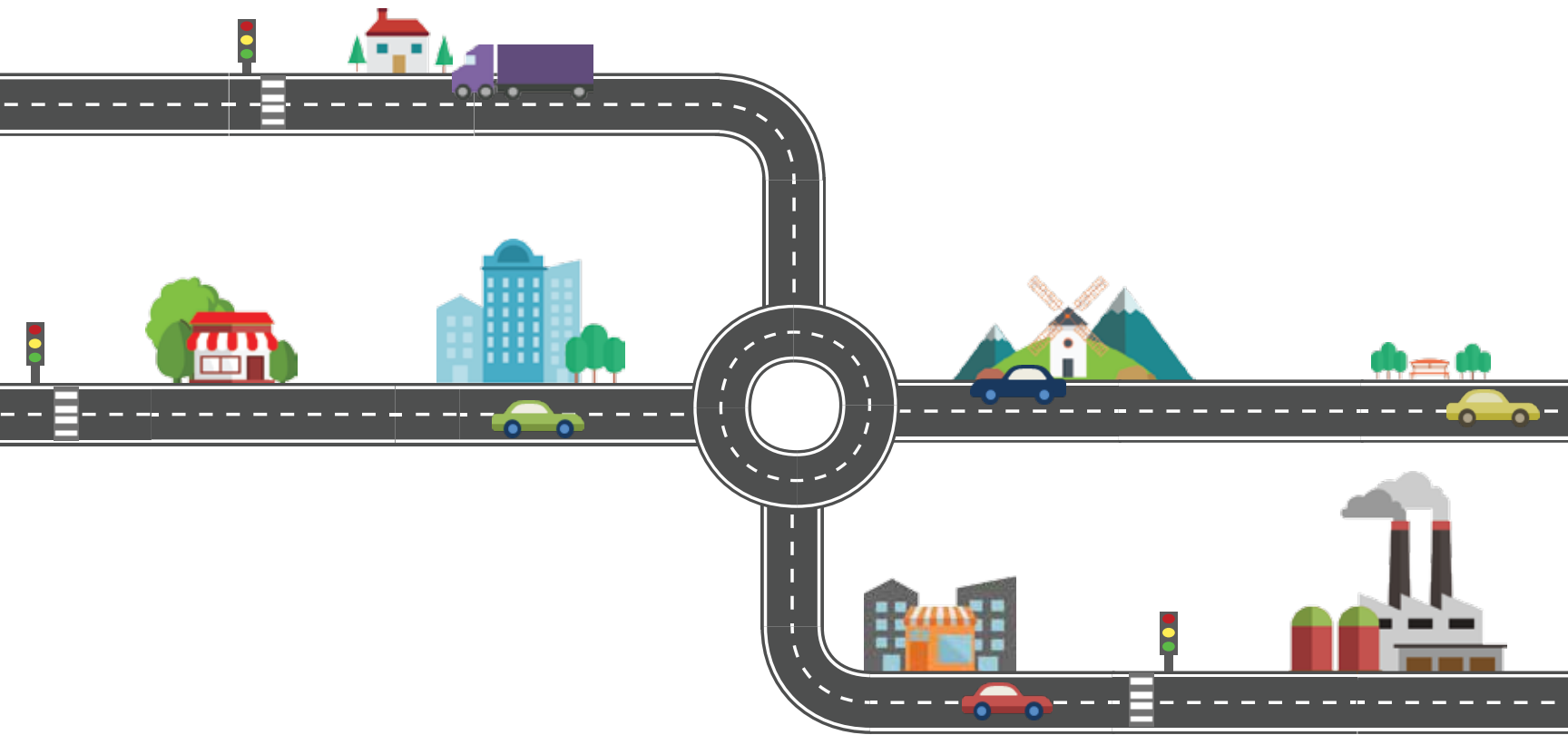
## REACH YOUR FINANCIAL DESTINATION

The journey is just as important as the destination. Learn more about what it means to have a Financial Destination and how we can help guide your journey to it.

# 5

**WHAT'S YOUR FINANCIAL DESTINATION?**

Life is complicated and the paths you could take are endless.



We can't promise that we can make your life less complicated, but we can help make your financial decisions simpler. Let us help you identify what your goals are and create a roadmap for reaching them by managing both investments and risks.

## FINANCIAL NEEDS ANALYSIS

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- Education Funding
- Section 529 College Savings Plans
- Disability Income & Life Insurance Needs Analysis
- Long-Term Care Insurance Needs Analysis

## INVESTMENT PLANNING

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- Analysis of Risk Tolerance
- Asset Allocation/Portfolio Construction
- Manager Research/Monitoring

## RETIREMENT FUNDING

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- Pension Maximization
- Qualified Distribution Analysis
- Income Needs Analysis

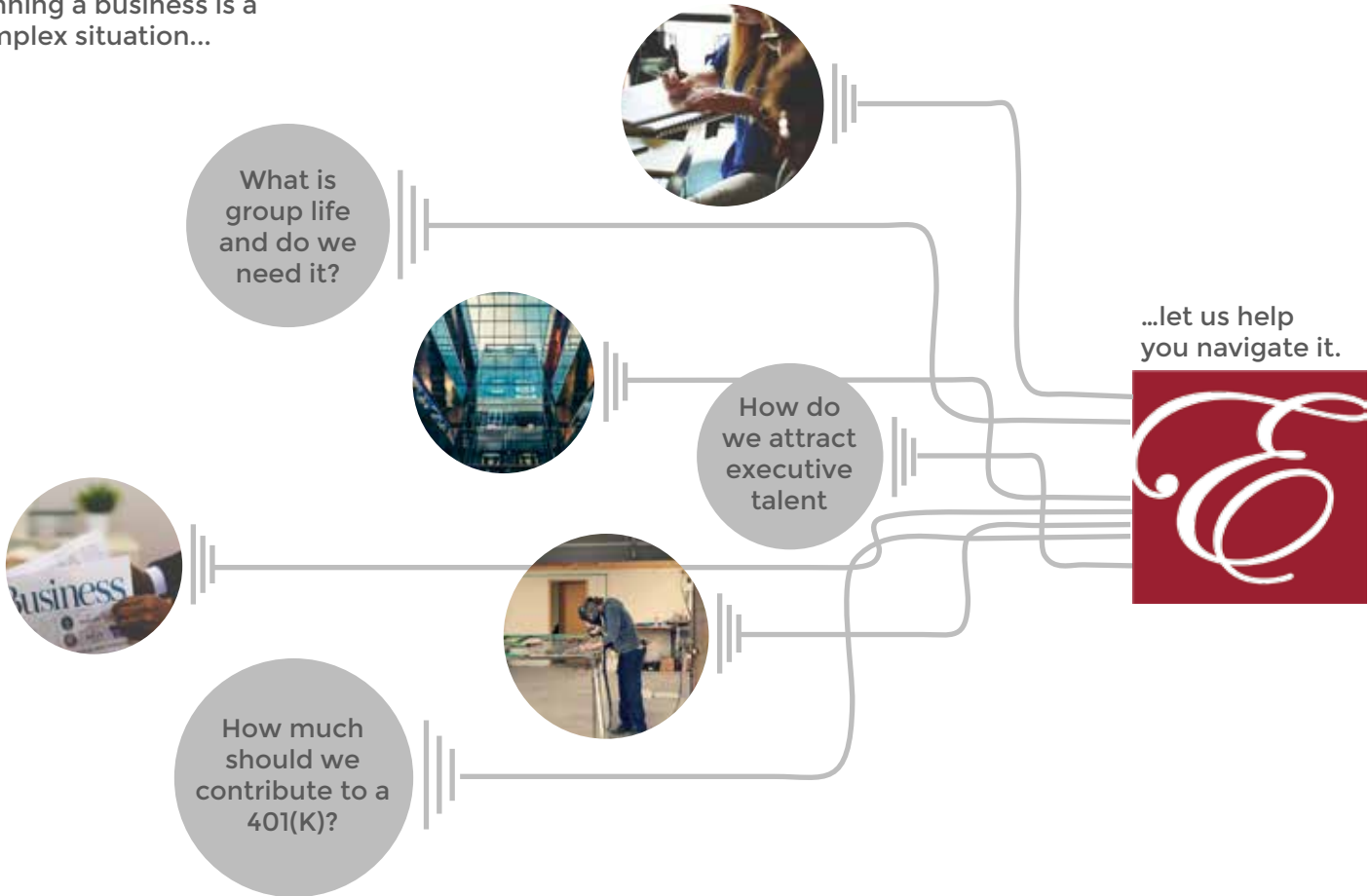
## ESTATE CONSERVATION

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- Estate Tax Calculation
- Estate Transfer Techniques
- Estate Planning Strategies

As an owner or manager of a business, there are a lot of competing responsibilities pulling you in different directions. Let us manage some of those responsibilities. We can help you protect your employees and provide for their future.

Running a business is a complex situation...



#### EMPLOYEE BENEFITS

Dental & Vision Plans  
 Short and Long-Term Disability  
 Group Life/AD&D  
 Group Medical & Health Plans  
 Provider Network Evaluation and Selection  
 Utilization & Cost Comparisons  
 Full Selection of Voluntary Benefits

#### QUALIFIED RETIREMENT PLANS

Qualified Pension & Profit Sharing Plans  
 SEP IRAs  
 Simple IRAs  
 401(k) Plans  
 Qualified Plan Analysis

#### BUSINESS SUCCESSION PLANS

Buy/Sell  
 Key Person Indemnification  
 Family Equalization Techniques

#### EXECUTIVE COMPENSATION PLANS

Section 162 Bonus Plans  
 Deferred Compensation  
 Split Dollar Funding

Where do you want to be next year? How about in 5 years, or 10, or 20? We can help you identify your goals and create a holistic risk and asset management plan to guide you to those short and long-term goals.

LET US HELP YOU REACH YOUR DESTINATION



**START HERE: .....  
HOLISTIC PLANNING**

We are not your typical financial firm. We think outside the box and have the ability to help you with all aspects of your life.

**..... UNDERSTANDABLE  
RECOMMENDATIONS**

We understand your needs and deliver on a customized, easy to understand roadmap.

**..... PERSONAL  
ADVOCATES**

Our service team is with you every step of the way. We advocate for you and your best interests.

**..... RESPONSIVE  
MANAGEMENT**

We guide and educate. We respond to unexpected events and help you adjust your financial plan.

**DESTINATION REACHED**

We have the right team to help you achieve your goals.





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What's *your*  
destination📍









**EDELMAN**  
WEALTH MANAGEMENT GROUP

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