Research Declaration

Anytime you introduce a list of, or even utter the words "Top", "Best" or "Most", you invite controversy or at the very least debate.

No doubt, our books are no different in that regard. They are different, however, from the many lists of Top 100 or Top 1,000 financial advisors, financial planners, wealth advisors, etc. Lists such as these are full of statistics. We noticed an abundance of scientific data, rankings of "client's net worth" or even "revenues generated" for each firm or advisor.

While the above mentioned criteria is very worthy, the positive impact that financial advisors make in the lives of their clients is the ultimate reflection of true success.

Each of the financial advisors chosen for our books have been thoroughly reviewed. Each applicant has endured an extensive personal interview and a rigorous regulatory background check.

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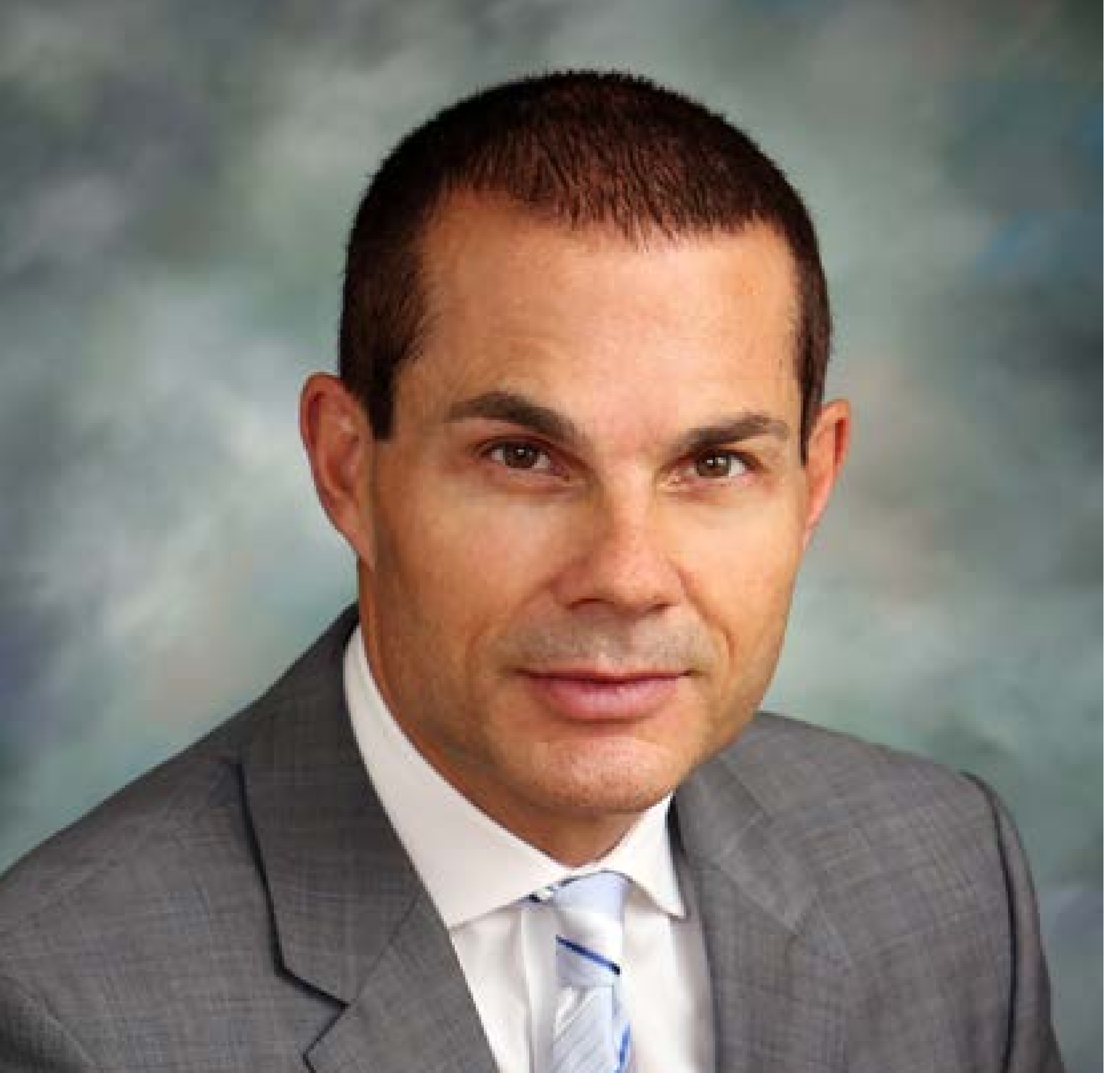
2014

America's 2014 Select Financial Advisors

JOHN P. SCHLATTER



Financial Strategy From John P. Schlatter, CFP

"Wealth is not primarily determined by investment performance, but by investor behavior. Therefore, before investing, it's imperative that you take the time with your financial advisor to fully understand what type of investor you are, otherwise, you may find out later this can be a very expensive proposition."

"Good planning helps the right choices reveal themselves."

Career Highlights

John, the youngest of seven children and a New York native, has always understood the true meaning and importance of family and what it takes to work together in both good times and bad. For this reason, choosing to lead a career in wealth planning was an easy decision for him once he graduated with honors from San Diego State University with a degree in Economics. Since then, he has helped families grow, enjoy and protect their wealth for 25 years.

The first time John helped a family settle an estate was when he realized that being a great planner goes far beyond just being a highly educated expert in various disciplines. He recognized it is about using expertise wisely, with integrity, and in a way which ensures his clients that he will follow through on every commitment, detail and promise made to them.

John has been recognized and honored by some of the most prestigious and well-known publications in the industry. In addition to being designated as a Certified Financial Planner (CFP®), John has been named in countless publications including the Wall Street Journal and Los Angeles Magazine as one of the top Wealth Managers in Los Angeles. In addition, he was recognized as "one of the most knowledgeable experts in the field of wealth management in Southern California" by the Los Angeles Business Journal. Finally, John has also been named as one of America's Top Financial Planners by Consumers' Research Council of America.

Salient Consulting Group Private Wealth Services

John's private wealth services and techniques are designed and offered, for clients with assets between $20 million and $500 million. His services are rooted in ongoing contact, consistent to his clients' affairs and a multi-generational focus. He meets with clients multiple times throughout each year, working with families to continue to navigate the challenges of managing the family wealth.

What distinguishes John from other planners and advisors in the wealth planning industry is his ability to delve into and clearly explain extremely complex wealth transfer techniques as well as wealth management strategies. Typically, a client will have several different advisors that provide these services. However, John's background allows him the capacity to consult at all levels regarding these two disciplines. In addition, John focuses on each family and each plan with the knowledge that someday the plan will come to fruition, which will be an emotional time for the family and its long standing advisors.

Most Gratifying Aspect Of Being An Advisor

John feels most gratified when his clients and their children and grandchildren recognize and respect the role he plays in growing, protecting, and transferring the families' assets through multiple generations. It gives his clients peace of mind that their affairs are in order and that they will be leaving a legacy behind for their family and charity.

Client Impact

One particular family was with John over the past 15 years, when the husband passed away. The surviving spouse was not as familiar with the finances, but relieved at the forethought and planning her deceased husband and John had put into place. All finances were in order as she continued her lifestyle, retaining real estate holdings and the family business.

Five years later, the wife passed away and the six children and 24 grandchildren experienced a smooth, yet private, wealth transfer which was beneficial and equitable to all. John facilitated the asset and business transfers without transfer taxes. Every child and grandchild received assets in their respective trusts without estate tax implications when the estate was settled. Through John, the clients created a legacy that allowed their assets to transfer through multiple generations which kept their family together. If not for the planning, the family could have easily been torn apart due to inequitable estate distributions and transfer taxes.

Giving Back

John is actively involved in his church, American Martyrs, located in Manhattan Beach, CA. His firm financially donates to various charities including Children's Hospital in Orange County and Los Angeles County.

Licenses & Designations

- Certified Financial Planner (CFP®)
- FINRA Series 7
- FINRA Series 63
- Life & Health
- Property & Casualty
- Wall Street Journal, Top Wealth Manager in Los Angeles
- Los Angeles Business Journal, Top Wealth Manager in Southern California
- Los Angeles Magazine, Top Wealth Manager in Los Angeles
- Consumers' Research Council of America, America's Top Financial Planners
- Lincoln Financial Group, Top Financial Planner
- Lincoln Financial Group's Chairman's Council, 18 years
- Lincoln Financial Group's Top of Council, 4 years

Licensed in seven states
Compensation paid via Fee and Commission

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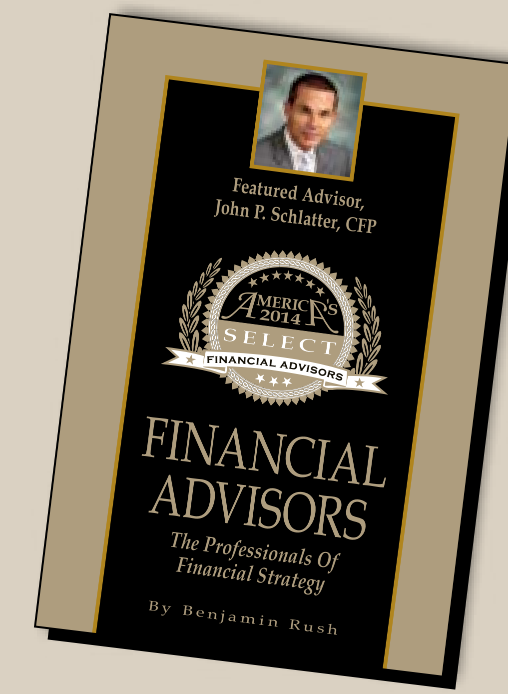
John P. Schlatter, CFP
Featured In The New Book...



Services Offered

- Inter-generational Wealth Transfers and Legacy Planning
- Asset Protection Strategies
- Philanthropic and Family Foundation Planning
- Private Wealth Services and Wealth Management

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