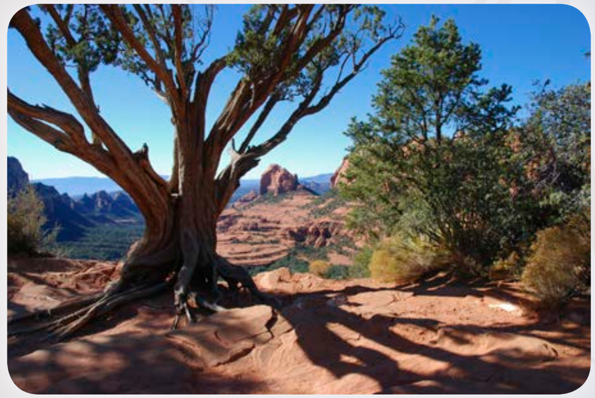
CLIENT-FOCUSED WEALTH MANAGEMENT

Copper Canyon Wealth Management focuses on you and the unique set of financial circumstances you and your family face. Getting to know you and understanding your personal needs allow us to create a customized wealth management strategy aligned with your short- and long-term objectives. By building a lasting, personal relationship with you, we are able to help you anticipate and plan for the future.

COMPREHENSIVE FINANCIAL STRATEGIES

We will help you develop a personalized financial strategy with your lifestyle goals in mind. Based on our discovery process, we will work with you to build an appropriate plan that supports your objectives, then monitor it regularly to help you stay on track. Our services and strategies include:

- Investment Advisory
- Investment Management
- Retirement Planning
- Lifetime Income Planning
- Education Planning
- Insurance Strategies
- Estate and Trust Planning
- Tax Strategies
- Gifting Strategies



UNBIASED FINANCIAL GUIDANCE

Planning for your financial future is one of the most important things you will ever do, so having access to resources and unbiased advice from a trusted partner can be invaluable. Copper Canyon Wealth Management has the flexibility to offer a wide range of non-proprietary products and services, which means you receive unbiased financial guidance and an assurance that your best interests always come first.

Copper Canyon Wealth Management
Investments | Insurance | Wealth Planning
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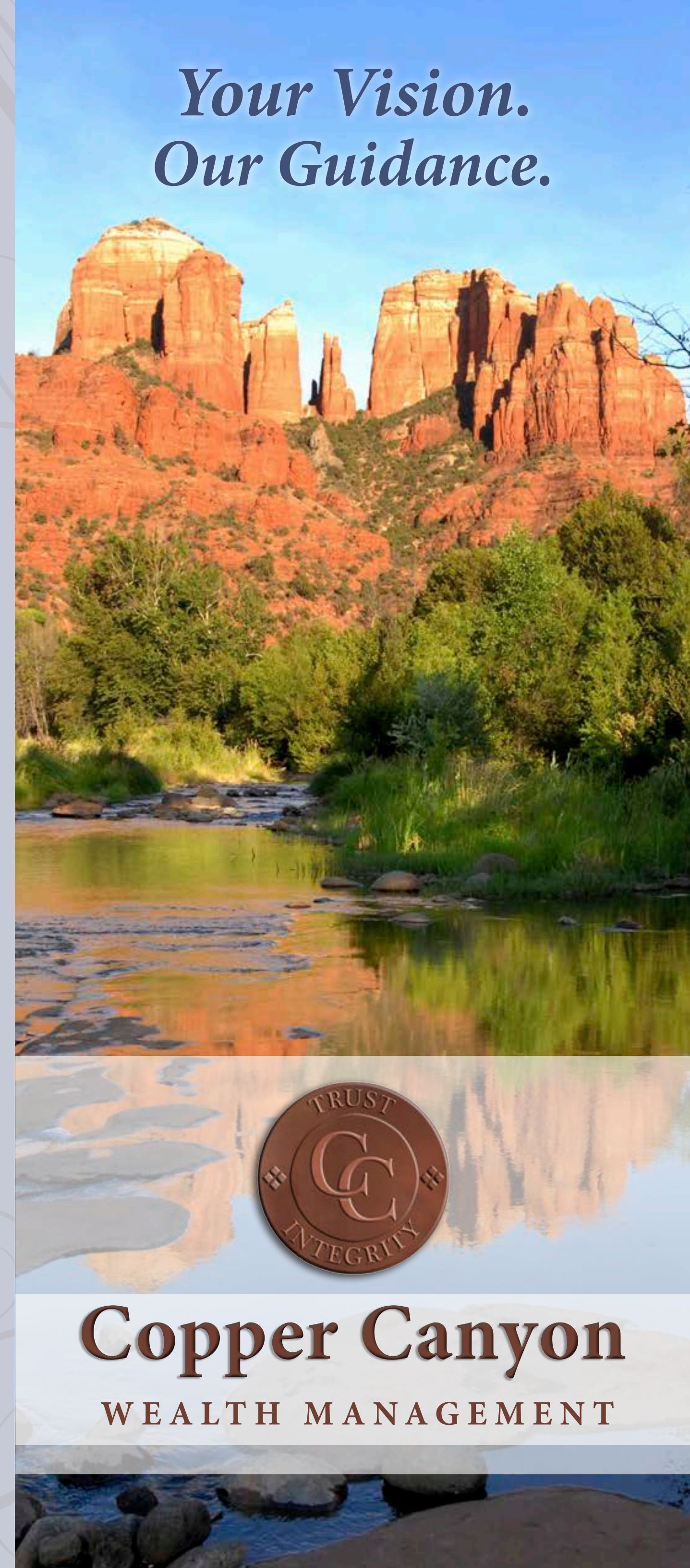
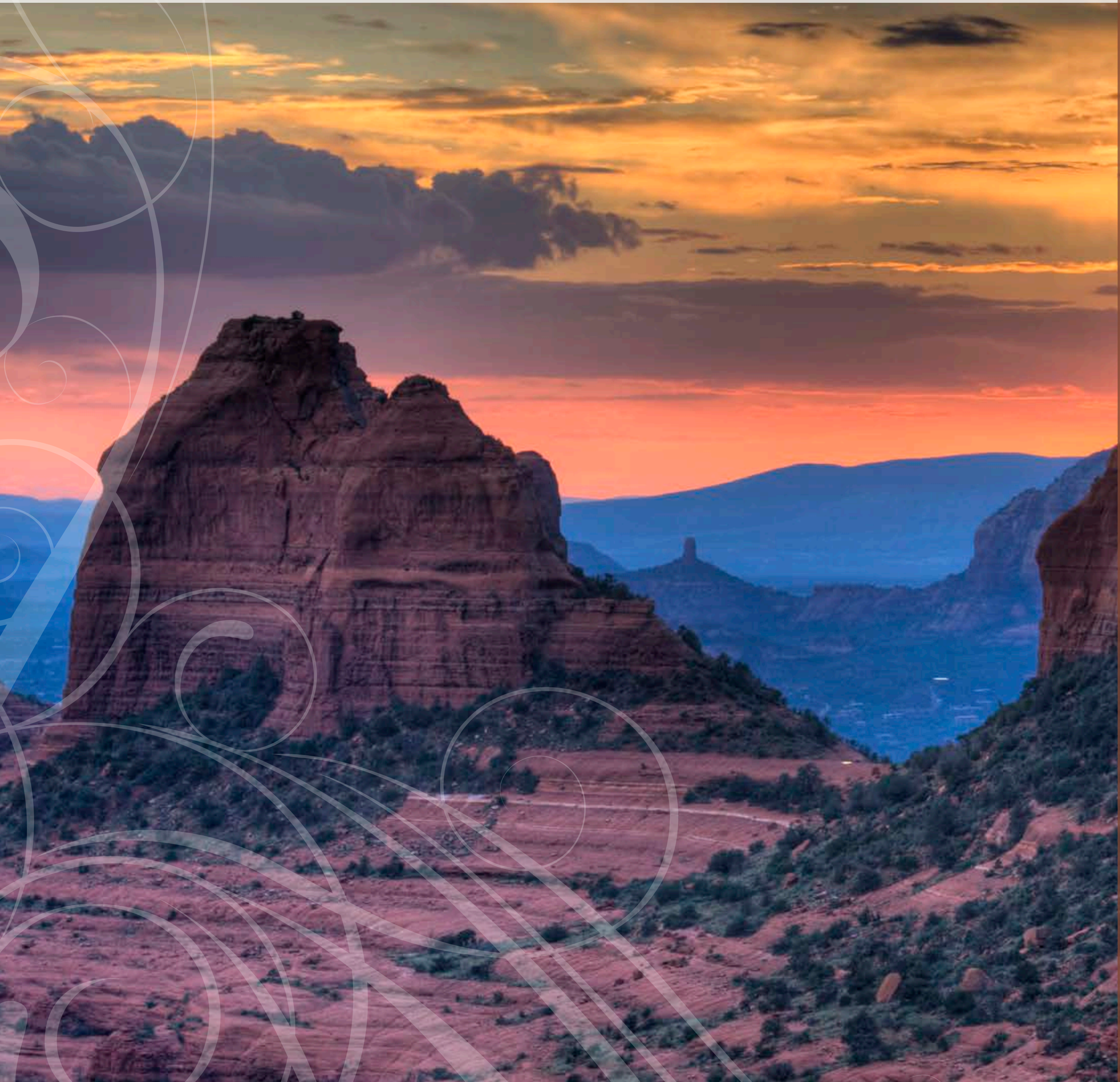


Our Mission is to help you simplify the demands of managing your wealth — and pursue your vision of the future.



OUR APPROACH TO YOUR PERSONALIZED PLAN

We use a client-centric process focused on pursuing specific milestones we will create together. Our comprehensive, four-step planning process is designed to help identify your needs, prepare and implement your plan, and monitor it regularly to help you stay on course:

❖ **Assessing Your Needs and Finances**
We begin by asking you to complete a confidential personal profile that helps us gain a deep understanding of your current financial situation and goals.

❖ **Preparing Your Plan**
We provide a detailed analysis of your finances, develop a variety of customized strategies, then offer suitable recommendations to address your future needs.

❖ **Implementing Your Plan**
Once you select the most suitable approach, we put your personalized plan into action.

❖ **Monitoring Your Strategy**
We then maintain consistent communication with you, carefully monitoring your portfolio and making adjustments, when necessary.

There is no guarantee that an investment strategy will yield positive outcomes. Investing involves risk including loss of principal.