RAYMOND | WESLEY

WEALTH MANAGEMENT

EXPERIENCED, COMPREHENSIVE FINANCIAL GUIDANCE

# We are Raymond Wesley Wealth Management.

Our firm designs, implements and monitors financial strategies through which you can effectively pursue your goals for accumulating and preserving wealth.

Our goal is to provide innovative strategies for wealth creation and preservation for business owners, executives, professionals, corporations and high-net-worth clients. We use a team approach to guide you concerning your investment portfolio, estate plan, cash flow, taxes and retirement, while providing objective advice carefully chosen to address your unique needs.

As we help you manage and preserve wealth, we strive to not only meet your expectations, but to far surpass them.

## Our Core Principles

- Strive for the advancement of sustained confidence by remaining client focused in an ever-changing financial landscape.
- Help you pursue your goals through objective guidance and personal service.
- Provide value by simplifying your financial picture and providing clear and honest communication.
- Practice with the highest degree of ethics and integrity.

## Holistic Wealth Management

As an independent financial firm, we are free to provide holistic wealth management and investment advice by offering a wide range of services and strategies that can be custom tailored to your unique needs. Through our experience and knowledge in account management, insurance, retirement planning, estate planning and corporate benefits, our goal is to help ensure that your complex financial picture is simplified and that you can confidently pursue financial independence.

## Generation to Generation

A company must be able to view the future as clearly as the past. We accomplish this by using a combination of experience and foresight in our collaborative decision-making process. The Raymond Wesley legacy reaches back to 1974, with advisors who bridge the generations, combining a strong foundation of time-proven principles with a keen awareness of the ever-changing financial landscape.

## Why Raymond Wesley Should Manage Your Corporate Retirement Plan

We understand you care about the well-being of your employees and that there is more to be done than simply selecting the right 401(k) plan. That's why we provide you with:

- Investment performance analysis
- Competitive cost comparison
- Fiduciary education
- Investment policy statement assistance
- Third-party review
- Regular, on-site assistance
- Employee education process
- Proactive service calls

## Specialists in Every Type of Financial Strategy

We specialize in designing innovative strategies specific to your needs. Whether you are an individual, business owner or represent a corporation or institution, you will always receive our commitment to helping you pursue your desired financial goals. With our foundation of personalized service and attention to detail, we offer you a comprehensive array of fee-based financial products and services.

### Investments

- Stocks
- Bonds
- IRAs (Traditional, Roth, SEP, Simple)
- Brokerage accounts
- ETFs
- Mutual funds
- Managed accounts
- Government securities
- Managed futures
- REITs
- 529 plans
- Annuities

### Insurance

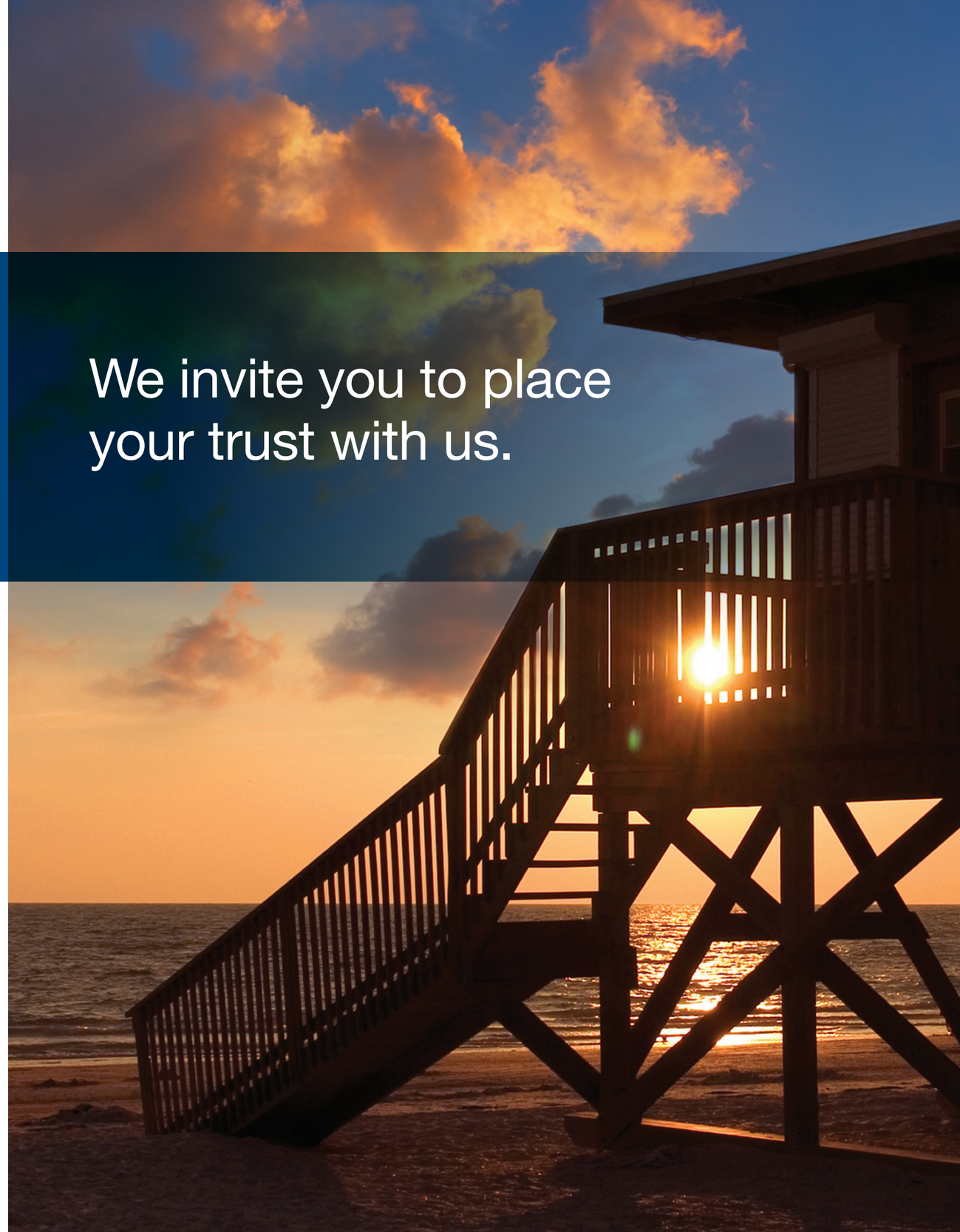
- Disability income
- Life
- Long-term care
- Group health

### Business Succession Planning

- Coordination of multi-disciplinary approach
- Identify and organize owner-driven exit planning issues
- Maximize and protect business value
- Ownership transfer to third parties
- Ownership transfers to insiders
- Business continuity

### Financial Planning

- Retirement planning
- Deferred compensation
- Defined benefit plans
- 401(k) planning
- 403(b) planning
- College plans
- Money purchasing plans
- Profit sharing plans
- Estate planning



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## Independence Powered by LPL Financial

Raymond Wesley is backed by the resources of LPL Financial, the nation's largest independent broker/dealer.* This relationship provides us with industry-leading, independent research and a comprehensive array of tools, resources and technology. Because LPL Financial has no proprietary products to sell, we have the freedom to offer you objective financial guidance and investment recommendations.

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

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