Celebrating 30 years of service

BAILEY
WEALTH
ADVISORS

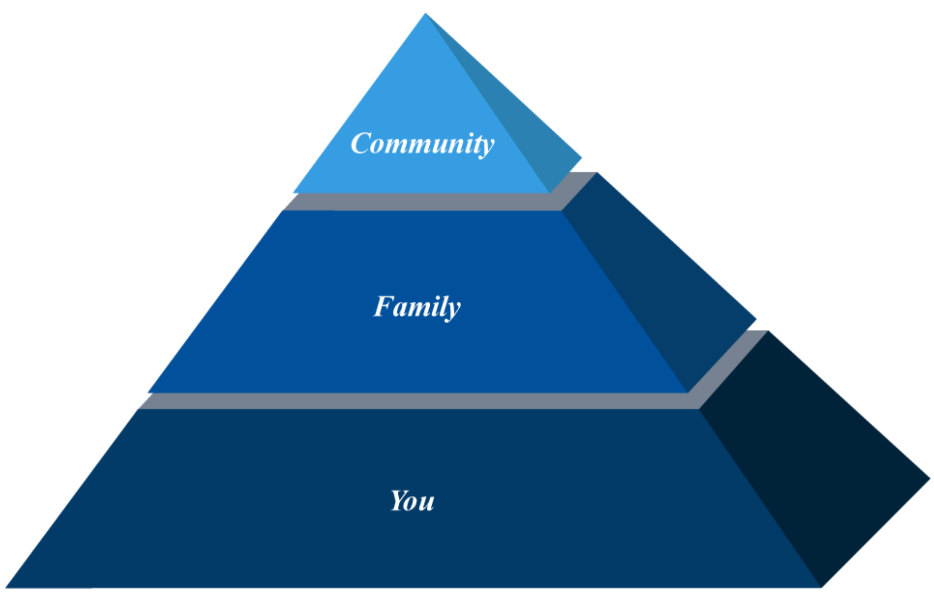
Literacy to Legacy

30 Years of Service: Literacy to Legacy

Literacy to Legacy is a program designed to create "Sustainable Wealth" by inspiring a greater appreciation for the transformative power thoughtful financial management can have. Over the next few years, Bailey Wealth Advisors will continue to host a series of programming designed to empower individuals, families and communities with the knowledge needed for true ownership of one's financial future. This will include events, workshops, and expert editorials with financial guidance.

Bailey Wealth Advisors founder Eric Bailey has more than three decades of elite service, which has provided him with unique insight into the financial challenges that various audiences face. Furthermore, these experiences have fueled Mr. Bailey's sincere passion for transforming individuals, families, and communities through financial literacy and training. It is this passion and in celebration of his 30 years of experience that inspired the Literacy to Legacy campaign.

Specifically, Literacy to Legacy will engage three distinct audiences:



FAQs

"Literacy To Legacy" (L2L)?

L2L is a BWA philosophy developed as a result of over three decades of service in the financial services field. It is a program of transforming individuals, families and communities through financial literacy, understanding and stewardship.

What is the objective?

The objective is to inspire a greater appreciation for the transformative power thoughtful financial management can have on self-preservation, community cultivation, business building or overall society enrichment.

Why is this important?

If sustaining wealth and long-term viability is to be achieved, individuals and organizations alike will require focused attention to navigate the financial challenges facing the American society. The L2L program identifies and shares fiscal strategies that speak to a multitude of beneficiaries and therefore, increases the opportunity for success in long term financial stability.

How does the program work?

BWA hosts a series of L2L programs, workshops, events and editorials that emphasize the advantages of designing sustainable wealth strategies for the benefit of creating family and organizational "Legacy". From a prospective of providing financial "Literacy" and understanding, a range of topics will be covered including, but not limited to:

- Wealth conservation
- Asset protection
- Business succession plans
- Investment management
- Retirement income
- Income tax reduction strategy
- Family sense of security
- Philanthropy planning

Who would benefit most from participating in the series?

BWA utilizes an inclusive approach that asks: “Are you ok?”, “Is your family ok?”, “Is your Community ok?” The L2L program is specifically designed for 1) individuals, 2) families and 3) community organizations that endeavor to navigate through the economic challenges associated with long-term financial stability.

Is there a cost to participate?

The L2L program is offered to interested audiences at no charge and is in recognition and celebration of BWA founder Eric Bailey’s 30 years of financial service and contribution in the Washington DC region. Mr. Bailey is committed to the L2L campaign in accordance with the philanthropy he hopes to engender once individuals, families and communities are empowered with the tools of sustainable wealth.

Is the program available on-line?

BWA disseminates a series of “Best Practice” material and timely articles of interest via multi-platform channels, including but not limited to; www.baileywealthadvisors.com, BWA “Linkedin.com” and “Twitter” accounts. We invite those interested to check those channels for updates and ongoing opportunities to participate.

How are the Workshops developed?

On-site workshops and educational programs are customized based on business, government and community partnerships. Additional workshops may be designed to address requests made by BWA clientele or in an effort to communicate important changes in the economic/legal and political landscapes that BWA believes may influence market conditions.

How can I register to participate or get more information about upcoming events?

To be included on our mailing list, please contact our BWA Silver Spring office at 301 585-4701. If you represent a business, social or community organization and are interested in having a customized program presented for your membership, please contact BWA associate Kathleen Lipshultz at 301 585-4701.

For more general inquiries on L2L or the BWA team, products and services, please log on to www.baileywealthadvisors.com, connect with BWA on LinkedIn and follow us on twitter.com.