

At MAKERS Wealth Management, we understand the power of independence when it comes to building and maintaining your wealth. We're proud to be exceptional independent wealth managers who always put our clients' best interests first.

The advantages we outline below demonstrate the value of independence in building and maintaining your wealth.

Tailored guidance designed specifically for you – and you alone

Large financial institutions design processes around what is best for “most” people. They have quotas to make and sales goals for their advisors. Their focus is on growing their firm first.

Our approach is based on always putting you, our client, first. No two people have lived the same life and have the same circumstances. There are similarities in our clients' life experiences, but at the end of the day, the details are unique. Our boutique-style business model gives us the flexibility to take the time to get to know you and spend the time you need. We design short-term and long-term goals with only you in mind. We want to grow the number of clients MAKERS Wealth Management serves with clients like you, but on our terms – not a corporation's.

Transparency, the heart of our client relationships

At MAKERS, trust and open communication are the foundation of our client relationships.

We believe in providing full transparency and clear, upfront language about our fees and compensation model. We update our clients regularly, sharing our market insights and investment strategies so that you always understand the reasoning behind decisions. **Our model is directly aligned with your success, so we succeed when you succeed.**



Owners and Senior Financial Advisors

Protecting your wealth with a robust system of checks and balances

When it comes to overseeing clients' strategies, investment reviews, and asset holdings, large financial firms tend to handle these operations internally. And self-regulation can lead to self-protection.

On the other hand, we utilize different companies to ensure that all our client engagement is handled with the utmost care and attention. This system of checks and balances helps protect you and ensure the very best professionals are at work building your wealth.

Our partners at **Fidelity Institutional**[®] serve as the Clearing and Custody Platform, charged with the safekeeping and delivery of funds.

All our transactions are overseen by **Kestra Financial**, whose compliance reviews serve a watchdog function as an additional layer of security to protect our clients' best interests.

Freedom to select customized investment options for you

Advisors at large financial institutions are often restricted to using their own proprietary funds, products, or services for their clients' investments, limiting the range of options available.

At large institutions, there may be a bias on the investments offered. There is a reason the name of the company might be the same as the name of the investments. There could be a conflict of interest when they are the same.

As independent wealth managers, we have the freedom to choose investment options that fit clients' needs because returns, risk, and cost matter. There are no MAKERS Wealth Management branded investments. We have the freedom to choose.

We have the benefit of selecting investments based only on what is best for each client.

The expertise that sets us apart

Training programs at large financial institutions are often standardized, with all financial advisors expected to adhere to the same approach and investments for every client. Potentially less focus is placed on clients' needs and more emphasis is placed on checking boxes. This can limit what their advisors are able to offer.

But in our experience, no two clients are the same. Every season of your life needs to move you toward and not away from your financial goals.

MAKERS specializes in financial planning during times of transition:

- Preparing for and living in retirement
- Preparing for and life after divorce
- Recovering from loss of spouse and finding your way
- Creating a plan to pay for college
- Managing inheritances and business sales
- Estate planning

In addition to our own expertise, we partner with trusted professionals outside of our firm – accountants, tax specialists, attorneys, etc. – to provide a comprehensive approach to financial planning.

So, why choose MAKERS?

At MAKERS, we are committed to working alongside our clients as their dedicated partners in wealth management. Our independence is of utmost importance to us, as it enables us to make the greatest impact for our clients.

You need a partner who can create an actionable financial plan that aligns with your unique goals. Our mission is to provide wealth planning that goes beyond preservation and growth – but also transforms lives. And as an independent, we are vested in your story, and we're here, ready and available to engage through every step of life that affects your financial future!

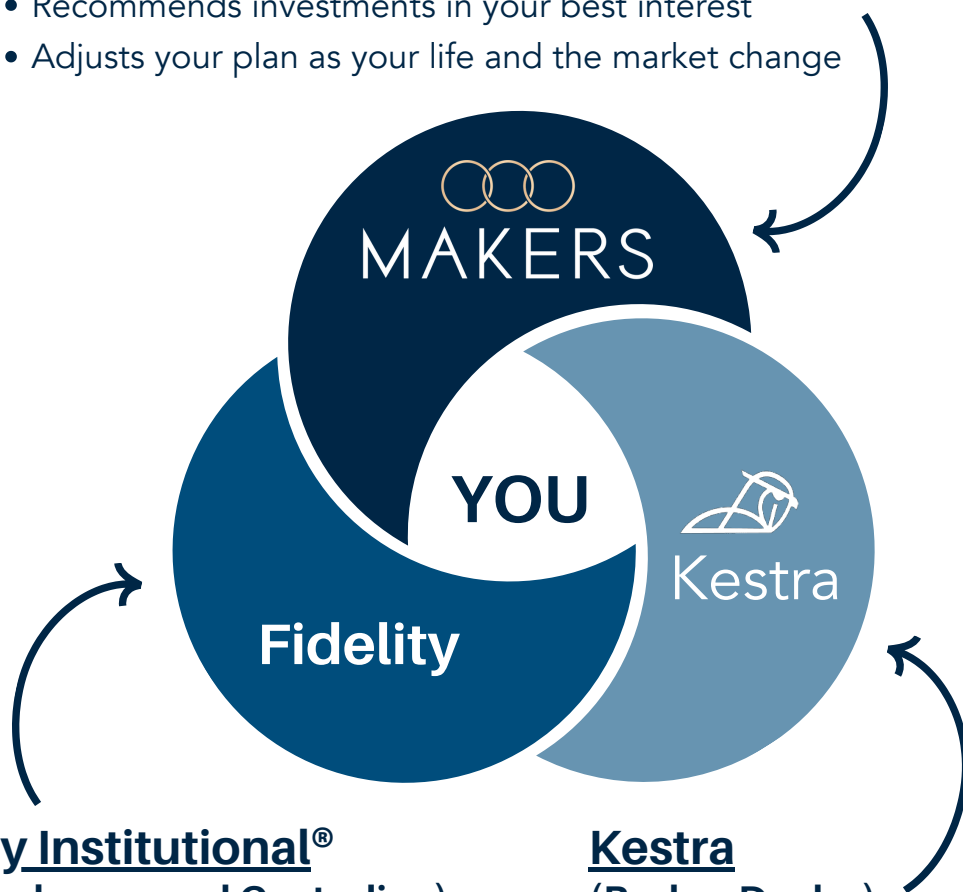
When you're ready to partner with a firm to help safeguard your assets and legacy, choose MAKERS Wealth Management, where independence is the key to delivering transformative wealth planning.

Who Is Working for You?

MAKERS Wealth Management

(Gina and Lisa)

- Develops a personalized strategy based on your full financial picture
- Creates a financial plan to help you achieve your goals and dreams
- Builds and manages your portfolio with a focus on returns, risk, and cost
- Provides guidance and support throughout the process
- Recommends investments in your best interest
- Adjusts your plan as your life and the market change



Fidelity Institutional[®] (Clearinghouse and Custodian)

- Safeguards and securely holds your money and investments
- Executes, clears, and settles all buys and sells promptly and efficiently
- Sends monthly statements, tax forms, and transaction confirmations
- Provides transparency and accountability

Kestra (Broker Dealer)

- Oversees every aspect of MAKERS' business, keeping us compliant and helping ensure decisions are made in our clients' best interest
- Supports with technology, market research, and best practices
- Provides back office support for ongoing management of assets