

INTRODUCTION

Dustin B. LaPorte, CFP® , CKA® , CCFS®
LaPorte Wealth Management Group

There is so much we want to share about us; However, all our meetings are designed to be focused on what is important to you, and not on a sales presentations on how great we are. Since our initial consultation is complimentary, all we ask is that you take the time to read this important document to know us.

Before you meet with any Certified Financial Planner™ professional there are certain items you may want to gather to help in the planning process. We have created these checklists to aid you in the process.

- [Financial Planning Checklist](#) – Documents you may need.
- [Financial Road Map](#) – Pin-point areas to seek advice.
- [DISC Profile Document](#) – Determine your main personality and what personality works best with you.

Agenda for our first meeting:

- Review the agenda, for agreed-upon purpose and direction
- Your Story: What is most important to you financially and spiritually
- What areas are you particularly seeking professional guidance
- What personality type best describes you
- Which personality types work best with you
- Questions you have about our us, our firm, and service levels
- Schedule time to talk about next steps

If we decide to move forward, to prepare for our next meeting:

- Enter your [basic data](#) into our secure portal – Allow 5 min.
- Complete our [online risk assessment](#) (If married, have your spouse separately complete our online risk assessment) – Allow 5 min.
- Next day or two, receive an invite to enter additional information into our #1 rated financial planning software (Financial Planning Tech 2018 Survey). You can either manually enter your financial data or securely link your online financial accounts to report directly into the software, providing real time data that automatically updates to create a clear and current financial picture.

OUR PROVEN PROCESS

At Every Session:

- Review the agenda, for agreed-upon purpose and direction
- Focus on what is most important to you
- Review our progress and schedule our next steps together

1st Session: Confirmation of Data and Direction

- Confirm what is most important to you: your values, goals, etc.
- Confirm your risk tolerance results
- Review and confirm the accuracy of information entered
- Agree upon and sign our estimated planning cost agreement

2nd Session: Plan Creation

- Discuss analysis and assumptions
- Review and fine-tune recommendations
- Confirm plan, strategies, direction, and schedule next action steps

3rd Session: Implementation

- Implement agreed-upon strategies to achieve what is most important to you: your values, goals, dreams, etc.
- Confirm service levels, type, and frequency of communication
- Sign documents

4th Session: Welcome (New Investment Accounts with Us)

- Review your first statement
- Setup and/or review online access
- Review the Expected Levels of Communication & Service Agreement

Planning and Investing Sessions (Ongoing)

- Confirm and adjust direction if need due to changes in financial goals or probability projects or life changes (risk, family, priorities, goals, gifting, cash flow, philosophy, taxes, selling property, etc.)
- Discuss tax and distribution strategies and tactical investment moves
- Review/coordinate with your advisors: CPA, attorney, agents, etc.
- Confirm and adjust direction if need your current plan's projections and probabilities

DEFINE WHAT MATTERS

Dreams essential to life; they bring inspiration and hope. However, dreams are only wishing until you...

*"Write the vision; make it plain...
so he may run who reads it"
(Habakkuk 2:2, ESV).*

Most do not take the necessary time to write down and follow their personalized God given road map. This creates a challenge for *"where there is no vision, the people perish"* (Proverbs 29:18, KJV).

Knowing the compelling vision God has placed in your heart for your life is key to your financial planning success. God made you and designed you just the way you are for a specific reason and purpose. He has placed a road map to your destiny inside of you which serves a purpose greater than you will ever know. You are an individual with unique qualities and giftings. To conform to this world's definition of success is not only an insult to you; it is an insult to your Maker. People who follow what the world defines as financial success will always be a failure for it is never enough.

A great advisor does not push his or her view of financial success on you. Instead, works with you to define what is most important to you; What legacy and difference are you called to make. This creates a framework to build upon which is vital to your personal success. You do not have to know the answers right away. However, it is important to start praying about them, asking, seeking, and knocking. Many of your answers will be reveal to you overtime as you become more equipped and skilled and have your team in place to guide you on our journey.

VALUES / LEGACY

Identify the God given values inside you that give you meaningful purpose in life (What is most important to who you are):

Which values are you "called" to bestow in the people you love (legacy):

What are you "called" to do that you want others to remember long after you are in heaven:

VISION

What is the compelling vision for your future that God has placed in your heart (what does it look like):

"Delight yourself in the Lord, and God will give you the desires of your heart" (Psalm 37:4, ESV). Pursing God given desires fulfill and produce results.

MISSION

A personal mission statement defines who you are and who you are not. It is a boundary marker that keeps you focused.

Based on your values and vision for your life...
What is your personal mission statement:

Based on your values and vision for your life and your skills and abilities and your personality traits and passions...
What is your professional mission statement:

GOALS

With a clear vision and mission to provide boundaries and stay focused, your next step is to work with an advisor to prayerfully create SMAC-certified goals (specific, measurable, achievable, compatible). Use my list of common client goals to assist you in knowing which goals you are prayerfully looking to accomplish by working with us.

"Within your heart you can make plans for your future, but the Lord chooses the steps you take to get there" (Proverbs 16:9, TPT).

- Freedom**
 - Having enough income during retirement
 - More time to enjoy the things in life I value
- Debt**
 - Cash flow and debt management/elimination
 - Purchasing another property or second residence
- Educate**
 - Providing for education
- Protect**
 - Family security in the event of death, disability, etc.
 - Protecting my assets from creditors and liability lawsuits
- Estate**
 - Legacy planning and efficient transfer of my estate
 - Business succession planning and family dynamics
 - Passing my core values/beliefs on to my children
- Charity**
 - Providing capital for charitable organizations
- Taxes**
 - Avoiding excessive taxes on the sale of assets
 - Reducing the income taxes
- Confident**
 - Having a sense of security/confidence in my plan
- Other**
 - _____

WHAT PERSONALITY DO YOU NEED

How is the chemistry? It depends a lot on your personality. Do you and the advisor mix well together? Are you and the advisor compatible? An advisor who has different core values and character that conflicts with yours will have a challenging time understanding and supporting your God-given goals. Based on who you are, what characteristics and traits are you looking for in an advisor?

These are NOT my God-given advisory personality and character traits. If you need these traits, you will have to look elsewhere:

- Assertive [I am bold, but not forceful]
- Calls Regularly with Investing Ideas [Not a salesperson relationship]
- Uses Anger to Motivate You [Not a yeller]
- Quick Decisive Decision Maker [Must analyze all the essential data]
- Unpersuaded by Your Emotions [Your emotions and math matter]
- Very High-Risk Investor [Not into foolish get rich quick investments]

These are my God-given advisory personality and character traits:

- | | |
|---|--|
| <input type="checkbox"/> Accountability Provider | <input type="checkbox"/> Optimistic |
| <input type="checkbox"/> Appreciative | <input type="checkbox"/> Precise/Very Detailed |
| <input type="checkbox"/> Approachable | <input type="checkbox"/> Resourceful/Out-of-the-Box |
| <input type="checkbox"/> Communicative | <input type="checkbox"/> Organized |
| <input type="checkbox"/> Confident | <input type="checkbox"/> Passionate |
| <input type="checkbox"/> Christian Morals & Beliefs | <input type="checkbox"/> Perfectionistic/Excellence-Driven |
| <input type="checkbox"/> Direct/Not Sugar-Coated | <input type="checkbox"/> Persuasive When Needed |
| <input type="checkbox"/> Discretion/Private | <input type="checkbox"/> Precise/Very Detailed |
| <input type="checkbox"/> Efficient | <input type="checkbox"/> Resourceful/Out-of-the-Box |
| <input type="checkbox"/> Empathetic | <input type="checkbox"/> Respectful |
| <input type="checkbox"/> Encouraging | <input type="checkbox"/> Results-Oriented |
| <input type="checkbox"/> Faith-Filled | <input type="checkbox"/> Sense of Humor |
| <input type="checkbox"/> Family-Focused | <input type="checkbox"/> Spiritual |
| <input type="checkbox"/> Friendly | <input type="checkbox"/> Stewardship-Focused |
| <input type="checkbox"/> Giving | <input type="checkbox"/> Systems Person / Consistency |
| <input type="checkbox"/> Grateful | <input type="checkbox"/> Teamwork-Oriented |
| <input type="checkbox"/> Honest | <input type="checkbox"/> Thoughtful |
| <input type="checkbox"/> Humble | <input type="checkbox"/> Transparent |
| <input type="checkbox"/> Integrity-Focused | <input type="checkbox"/> Trustworthy |

CHOOSING YOUR ADVISOR

God has placed certain advisors in your life who have the character, competence and chemistry needed to guide you every step of the way, and to maximize your success. They provide confidence and clarity. These advisors are essential. That is why it is so important to define what competencies, character and personality traits are most important to you in an advisor.



CHARACTER

One of the easiest ways to learn about Dustin LaPorte, or any other advisor, is to go to FINRA's website. Download and review the advisor's full detailed [FINRA](#) report by selecting the "Detailed Report" download link, found on the top right corner of the [FINRA Broker Check](#). Use this information to research the advisor's experience, and to look for violations and outside activities that may violate your core values.

Before ever working with an advisor, research the advisor's website for items that reveal the advisor's heart (www.dustinlaporte.com). Go to the advisor's Social Media websites like [Facebook](#) and [LinkedIn](#) and see the people you have in common and ask them about the advisor. Does this advisor view his or her occupation as a calling, or just a job? Through the *All Access* pastoral training program, led by [Mac Lake](#) at Seacoast Community Church, Dustin received over 800 hours in pastoral training and experience. He also was mentored an additional two years by PhD, author, pastor, and former Bishop [Dr. Vern Jensen](#). As a [Certified Kingdom Advisor®](#), Dustin learned how to confidently navigate financial decisions as a faithful steward. His Biblically wise financial advice is rooted in the firm foundation of God's Word. Visit CKA®'s [Official Website \(KingdomAdvisors.com\)](#) to learn more. Dustin considers himself to be a [Financial Pastor](#) to his clients. Dustin wants his clients to be successful in all areas of life.

COMPETENCY (HISTORY)

In 1995, Dustin began his career as a financial advisor. In 1999, BB&T Securities recognizes his talents, and promoted him over a region of bank branches to provide financial advice to their bank customers. Quickly, other prominent banks pursued him and incentivized him to move to their banks. Eventually, Dustin opened his own practice. He wanted the freedom to be able to minister to his clients, and to have the discretion to do what he believed was in their best interests.



EDUCATION AND ACHIEVEMENTS

- **College**

University of NC at Charlotte,

B.S. degree in Business Administration

American College,

Prerequisite classes for the Board-Certified CFP® Exam

- **Diversified Licenses**

Mortgage

Investments (Series 6, 7, 63, and 65)

Insurance (Life, Health, Accident, Long-Term Care, and Disability)

- **Elected Board of Director and Investment Committee Chair**

Girl Scouts of Eastern South Carolina, one of the most reputable and well-known organizations for girls.

- **Chosen Dave Ramsey SmartVestor Pro®**
Not just anyone can be a SmartVestor Pro®. Ramsey Solutions interviewed and vetted over 1,200 pros across the country. Each SmartVestor Pro® must adhere to Ramsey Solutions' Code of Conduct, and SmartVestor Pros® have a client-first mentality. For more information, please visit the SmartVestor Pro® Official Website
- **Certified Financial Planner™ (CFP®)**
Only those who have fulfilled the certification and continuing education requirements of the CFP® Board can display the CFP® certification marks, which represents one the highest levels of competency, ethics, and professionalism. Dustin adheres to the CFP® professional Code of Ethics and Conduct which requires him to place your interests above his own. For more information, please visit the CFP® Official Website (CFP.net) or download their Fact Sheet. To verify if an advisor is a CFP® professional go to letsmakeaplan.org
- **Certified College Funding Specialist® (CCFS®)**
A Certified College Funding Specialist® is qualified to give advice on the financial aspects of paying for college. By working with a CCFS®, on average, people save 15-30% on the overall cost of college. Each CCFS® is required to adhere to the highest standards of professional competence, ethical standards, and continuous professional education in the college financial planning field. They are trained to share prudent tax, financial, cash flow, and lending advice that helps families lower the costs of college and pay the tuition bill. Visit CCFS®'s Official Website (hireaccfs.com) or verify if an advisor is a CCFS® on hireaccfs.com/search

- **Pastoral Training**

Graduated from the *All Access* program at [Seacoast Church](#), which required a year-long commitment (including over 800 hours of in-depth, hands-on ministry training led by well-known ministry consultant, [Mac Lake](#)). Mentored an additional two years by PhD, author, pastor, and former bishop, [Dr. Vern Jensen](#).

- **Certified Kingdom Advisor[®] (CKA[®])**

Certified Kingdom Advisor[®] is a designation granted by Kingdom Advisors started by Ron Blue and Larry Burkett. We confidently navigate your financial decisions as a faithful steward through a Christian worldview. The designation is issued only to individuals who have:

- v' Demonstrated the ability to apply Biblical Wisdom in financial counsel
- v' Successfully completed the rigorous Certified Kingdom Advisor[®] coursework and examination
- v' Provided evidence of an approved professional designation and/or experience requirements
 - v' Active local church involvement
- v' Provided pastoral and client letters of reference

Please feel free to visit CKA[®]'s [Official Website \(KingdomAdvisors.com\)](#). To verify if an advisor is a CKA[®]'s visit kingdomadvisors.com/find-a-professional/directory-search

COMMITMENT TO EXCELLENCE

Many of the services and companies we partner with are ranked **#1** in their industry. We have intentionally researched and chosen to purchase these additional services to provide an excellent client experience. As a firm, we are committed to be the best in our field because we believe that "...whatever you do, do it all for the glory of God" (1 Corinthians 10:31, NIV). "Someone skilled in their work... will serve before kings; they will not serve before officials of low rank" (Proverbs 22:29, NIV). A great advisor knows that, to be the best requires being the best at what *they* are called to do—and hiring the best to do the rest. An advisor is only as good as his or her ability to have access to right tools, knowledge, and people.

To offer the high-level of service our clients have come to expect, we use these support services:

Third-Party Money Management Support: Think about this... *If your advisor is also your money manager, how likely is your advisor going to fire himself if he does a horrible job?* To us, an advisory relationship is a long-term relationship built on trust, care, and deep friendship. The last thing we want to do is to endanger our relationship with you based on poor investment performance. By using third-party money managers, we protect our relationship with you. If we do not like do not the overall performance of the third-party managers, we fire them.

How can an advisor truly watch all accounts and keep track of markets and, at the same time, spend most of his/her time in meeting clients or prospects, making or returning calls and emails, reading, and researching? To be a great buyer and seller of individual investments requires complete focus on that responsibility. Advisors should advise and money managers should manage. So why do so many advisors try to do both? Is it ego or because they collect more fee revenue by not having to pay for a third-party? Is it truly in your best interest to work with advisors who think they can be great at both, especially when their attention is so unfocused and scattered? Dustin is licensed for investment advisory, mortgages, and insurance, and he works with skilled professionals in their field, sharing in

the revenue that comes from providing his clients access to these valuable resources.

Local investment advisors do not have the capacity to spend millions annually on research and technology and conduct over a thousand onsite interviews with different investment advisory firms. That is why Dustin works with independent third-party money management firms that do have this capacity.

What happens if your local money manager dies, retires, or becomes too busy? Who then is watching your account? The buying and selling of investments require a full-time commitment to watching the market, that is why Dustin has chosen to work with third-party money managers. Hiring out the money management allows Dustin to focus on what he cares the most about, relationships.

Broker Dealer Support: Dustin chose American Portfolios (AP), selected as Broker-Dealer of the Year 5 years in a row (Division III) by Investment Advisor magazine for 2015, 2016, 2017 and 2018, 2019 based on a poll of registered Broker-Dealers (rated highest by their representatives), and selected as Top 10 Best Small/Mid-Size Companies to Work for in the state of New York for 2016, 2017, 2018 and 2019 by the New York State Society for Human Resources Management (NYS-SHRM) and the Best Companies Group (BCG). American Portfolios was named a WealthManagement.com 2019 Industry Award Finalist for Enhanced Customer Service Support in the category of Broker-Dealers with Fewer than 1,000 Advisors.

Planning Support: Dustin chose MoneyGuide Pro, #1 ranked financial planning software 11 years in a row, according to Financial Planning Tech Survey (2018). Securely link your online financial accounts to report directly into the software, providing real time data that automatically updates to create a clear and current financial picture.

Research Support: Dustin uses a variety of well-known and respected research from Morningstar, Lipper, and other investment advisory firms.

OUR TEAM

Working alongside Dustin, [Anissa LaPorte](#) (former Registered Nurse) is entrusted to provide the excellent customer service. She is the person to call when you need information about our planning process, or to schedule an appointment. She will coordinate the appropriate team members



to respond to your needs. Behind the scenes, we have many dedicated support team members at American Portfolios. [Jeff Hartman](#), Office of Supervisory Jurisdiction, is Dustin's accountability partner, and backup when Dustin is out of the office. Both Dustin and Jeff have similar years of experience and core values, and they both have had the privilege of being trained by [AXA](#) in financial planning.

Through various agencies, Dustin has the ability to shop anonymously for you, to gather rates and information from some of the top name insurance carriers, such as MetLife, Nationwide, Prudential, AXA, ING, Lincoln National, John Hancock, Genworth, Protective Life, Transamerica, United of Omaha, American General, and more. Imagine not having to deal with a dozen different insurance agents all calling you, trying to get you to buy from them. Using a consultative, non-pressure approach, Dustin will be your agent for those carriers for he is a licensed insurance agent in South Carolina and North Carolina for:

- Annuities
- Disability Insurance
- Life Insurance
- Long-Term-Care Insurance
- Health Insurance

Dustin LaPorte is also a licensed Mortgage Officer with [HomeFirst Mortgage Corp](#) for North Carolina and South Carolina. The rates he gets for his clients are way below the National Average. His secret to crushing the competition is to keep his fees and overhead costs low and use software to anonymously shop over 30 lenders all at once. Each bank changes its rates throughout the day depending on the market. Without this technology, it is impossible for you to know with which lender has the best rate at that moment in time. Even if you spent a week applying with 30 lenders, by the time you received all their quotes and reviewed them, their rates would have changed. [HomeFirst Mortgage Corp](#)



was started by experienced Loan Officers and is still owned and managed by one of the original founders, Greg Kunding (NMLS#:4746). Greg brings over 30 years of mortgage banking experience to his approach to running the business. Dustin's processor is Bonnie Neuss, who has over 20 years of mortgage banking experience and was a former underwriter.

Because financial situations are often complex, we typically work directly with you and a network of additional expert professionals, to provide you with technical advice, when required, to design and implement the strategies to help you achieve your goals. These professionals include:

- Real Estate and Trust/Estate Lawyers
- Certified Public Accountants
- Real Estate (commercial and residential) Professionals

COMPENSATION FOR ADVISORY SERVICES

We believe it is important to be paid for what we do, and not by what we sell. We are mainly compensated through assets we manage, or by set financial planning fees. We are opposed to commissionable products, unless the product is the best solution for your needs.

Planning is crucial to your investment strategy and is a necessary part of our investment advisory services. Depending on the amount of assets we manage for you, we will reduce or waive our financial planning fees. The cost of planning will be known up front, before any work is done, and we will all agree upon the scope and cost of the engagement before any work is done. If we discover there is greater complexity than originally discussed, then we will address the additional cost immediately.

Basic Financial Plan (Bronze Level): Free if we manage \$100,000 or more of your investable accounts in an advisory account. Without an advisory account, plans cost around \$800 to \$1,500, and \$200 or more for each additional session, beyond creation of the plan.

Comprehensive Financial Plan (Silver Level): Free if we manage \$500,000 or more of your investable accounts in an advisory account. Without an advisory account, plans cost around \$3,000 to \$10,000 for the plan, and \$200 or more for each additional session, beyond creation of the plan.

Specialized In-depth Complex Financial Plan (Gold Level): Free if we manage one million dollars or more of your investable accounts in an advisory account. Without an advisory account, plans cost around \$10,000 to \$30,000 for the plan, and \$200 or more for each additional session, beyond creation of the plan.

Focused Needs: Without an advisory account with us, cost is \$200 per session. A session normally runs around one hour. This is for focused needs: cash flow, debt reduction, investment risk analysis, Social Security, Roth conversion, basic entry college or retirement planning, etc.

**EXPECTED LEVELS OF COMMUNICATION
AND SERVICE AGREEMENT**

| | Bronze | Silver | Gold |
|---|---------------|---------------|-------------|
| Based on Your Managed Assets at our firm | \$100k | \$500k | Million |
| Strategic Meetings (per year) | 1 | 2 | 4+ |
| APA Registered Investment Advisor Advisory | .65 to 1% | .55 to .85% | .45 to .7% |
| Risk Tolerance Evaluation | ✓ | ✓ | ✓ |
| Asset Allocation | ✓ | ✓ | ✓ |
| Seminar Invitations | ✓ | ✓ | ✓ |
| Access to RightNow Media Video Content | ✓ | ✓ | ✓ |
| Financial Planning Web Portal | ✓ | ✓ | ✓ |
| Investment Policy Statement | ✓ | ✓ | ✓ |
| Match Goals with Portfolios | ✓ | ✓ | ✓ |
| Analyze Life, Disability, LTC Coverage | ✓ | ✓ | ✓ |
| Anonymously Shop: Life & Disability Insurance | ✓ | ✓ | ✓ |
| Anonymously Shop Rates/Terms: Mortgage | ✓ | ✓ | ✓ |
| Retirement Savings and Income Analysis | ✓ | ✓ | ✓ |
| Assist in Implementing Basic Financial Plan | ✓ | ✓ | ✓ |
| Comprehensive Financial Plan | | ✓ | ✓ |
| Assist in Implementing Comprehensive Plan | | ✓ | ✓ |
| Special Client Events | | ✓ | ✓ |
| Active 401(k) Review | | ✓ | ✓ |
| Cash Flow Management | | ✓ | ✓ |
| Referral Dinners | | ✓ | ✓ |
| Analyze Health and Property Insurance | | ✓ | ✓ |
| Legacy/Estate Planning Assistance | | | ✓ |
| Specialized Planning | | | ✓ |
| Taxation Sensitivity | | | ✓ |
| Intimate Private Client Events | | | ✓ |
| Charitable Giving Strategies | | | ✓ |
| Multi-generational Wealth Transition | | | ✓ |
| Advanced Investment Strategies | | | ✓ |
| Work with Specialist Advisors | | | ✓ |
| Open Access to Advisor | | | ✓ |
| Business Succession Planning | | | ✓ |
| Total Insurance Review | | | ✓ |

OUR INVESTMENT PHILOSOPHY

The foundation of our investment philosophy comes from a surprising source - King Solomon's writings found in both Jewish and Christian Bibles.

DEFINE: Path, Direction, Objectives, and Diligently Stay the Course

- Proverbs 21:5, NIV "The plans of the diligent lead to profit..."

DIVERSIFY: Seek Growth While Managing Risk

Inside of your portfolio with us, we will manage risk by owning a wide variety of investment asset classes, selected by multiple trusted advisors:

- Ecclesiastes 11:2, NLT "But divide your investments among many places, for you do not know what risks might lie ahead."
- Ecclesiastes 11:6, NIV "...for you don't know if profit will come from one activity or another."
- Ecclesiastes 11:1 "Send your grain across the seas, and in time, profits will flow back to you" (NLT). "Invest your money in foreign trade, and one of these days you will make a profit" (GN).
- Proverbs 11:14, NIV "...victory is won through many advisers."
- Proverbs 24:6, NLT "...victory depends on having many advisers."

DISCIPLINE: Count on Our Process Instead of Emotions

We do not wait for perfect weather to invest. We monitor investment storms and are tactical in our approach to when and where we invest.

- Ecclesiastes 11:3-4, NIV "When clouds are heavy, the rains come down... Farmers who wait for perfect weather never plant. If they watch every cloud, they never harvest."

WHAT YOU CAN EXPECT

You can trust that we will consistently and responsibly perform all requested services promptly. We will:

- Treat you with respect, honesty, and dignity
- Place your interests first
- Strive to acquire a complete and accurate understanding of your goals, your tolerance for investment risk, and your time frame
- Explain the implications of the strategies we propose

WHAT WE CAN EXPECT

Effective communication and mutual respect are essential to a successful partnership, so we expect:

- Trust
- Respect
- Sincere Honesty / Complete Disclosure
- Commitment

Our recommendations are always developed with your interest in mind. As our client, all investments, tax, estate, and insurance advice will be based on the information you provide to us.

We only work with people of integrity, who are living within the boundaries of the law.

Communication is essential to effective financial planning. To make your financial strategies a priority, we both agree to keep each other informed of new developments impacting your plan. Through mutual trust, respect, and understanding, our regular strategic meetings we will be honest and forthcoming regarding your financial situation.

SECURE AND CONVENIENT

Our firm is all about making life more secure and convenient for you. Here are some services we provide to make your life easier:

LESS TRAVEL TIME

Dustin meets with most of his clients through an amazingly easy-to-use, high-quality video conferencing program.

Benefits of Video Conferencing:

- No more lost travel time to our office
- No more fighting Mount Pleasant traffic
- Meet in comfort of your own living room, office, or in anywhere in the world. When you move, we can, potentially, move with you.

Dustin has clients in New York, Maryland, North Carolina, South Carolina, Georgia, Florida, Mississippi, Washington, and even Mount Pleasant, SC, who love using this technology with him.

LESS TIME ON PAPERWORK

The challenge with meeting via video conference is signing forms. Once again, we are all about making life more convenient and secure for you. Through our electronic signature process, you can easily sign most of our advisory paperwork.

Benefits of Electronic Signature:

- No more printing, scanning, or faxing
- Saves valuable time for everyone
- No more missing signatures
- Quick processing time
- Immediate electronic copy for your files
- Reduced errors and mail time

LEGAL DISCLOSURES

Investments - Securities are offered through American Portfolios Financial Services, Inc. (APFS) Member FINRA/SIPC. Investment Advisory Services are offered through American Portfolios Advisors, Inc. (APA), a SEC Registered Investment Advisor. LaPorte Wealth Management Group is not affiliated with APFS and APA. Do not use email to: (1) request, authorize or enter the purchase or sale of a security; (2) send fund or securities transfer instructions. Mailing Address: 180 Mossy Oak Way, Mount Pleasant, SC 29464 / Branch Address: 1476 Ben Sawyer Blvd, Suite 3, Mt. Pleasant, SC 29464. Dustin LaPorte is licensed to sell securities in the states of AL, GA, MD, MS, NC, NY, SC, and WA. Dustin LaPorte is licensed to provide advisory services in the states of AL, GA, NC, and SC. America Portfolios is not affiliated with any other companies Dustin LaPorte represents through LaPorte Wealth Management Group.

Mortgages - Mortgages are offered through HomeFirst Mortgage Corp. HomeFirst Mortgage Corp. is not affiliated with APFS/APA. Dustin LaPorte is a licensed loan officer in South Carolina with HomeFirst Mortgage Corp. Branch office is located at 180 Mossy Oak Way, Mount Pleasant, SC 29464. SC Mortgage License MB-0511800-1103101 / NMLS Loan Originator ID 106506 & Corp ID 2919. HomeFirst Mortgage Corp. is not affiliated with any other companies Dustin LaPorte represents through LaPorte Wealth Management Group.

Insurances - Insurance is provided through a wide variety of agencies. Dustin LaPorte is a licensed SC and NC Insurance Agent. The various agencies Dustin LaPorte works through in providing insurance are not affiliated with any other companies Dustin LaPorte represents through LaPorte Wealth Management Group.

Review: [Dustin's IAR Resume](#) & [APA RIA Brochure](#)