



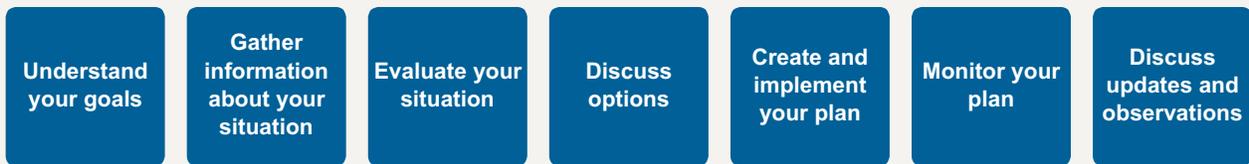
Our Commitment to You

Our team is dedicated to helping you achieve your financial goals by providing personal attention and quality services.



How we help you succeed

We provide cost-efficient portfolio construction, comprehensive wealth management, and ongoing discussions to earn your confidence and help you achieve your goals.



Reach your goals | Maintain confidence | Balance risks, rewards

We offer a range of planning resources and services to help you reach your goals:

- Comprehensive Financial Planning
- Retirement Income Planning
- Investment Recommendations
- Portfolio/Asset Management
- Social Security Analysis
- Health Insurance Analysis/Solutions
- Long Term Care Insurance Solutions
- Life Insurance Analysis/Solutions
- Coordination with other professionals
- Assistance with current retirement plan accounts
- Assistance with Estate Planning

How we communicate with you

Scheduled outreach includes regular planning reviews, check-ins, ongoing education opportunities, and our weekly and monthly market commentaries via email. You can also count on a response within 24 hours whenever you contact us with a question or concern.

Our cost structure

Our investment advisory practice is fee-based. Our annual investment advisory fees are calculated simply as a percentage of assets under management. Our fees are not based on trading activity or commissions. The table below reflects what our fees may look like for you.

ASSETS MANAGED	ANNUAL ADVISORY FEE
Up to \$249,999	1.25%
\$250,000 - \$499,999	1.15%
\$500,000 - \$1,499,999	1.00%
\$1,500,000 - \$2,999,999	0.85%
\$3,000,000 - \$4,999,999	0.70%
\$5,000,000+	0.50%

As a team of CERTIFIED FINANCIAL PLANNER™ Practitioners, we are on your side

Meeting someone new and then talking about something as personal as your finances can be a little overwhelming. We are here to simplify the conversation and help you make the best financial decisions now and down the road.

Crafting a financial plan

To design a financial plan for your life, first we look at where you want to go, then we look at where you are to day. Here's what we'll go over together:

- ✓ Current net income and lifestyle expenses
- ✓ Recent paystubs
- ✓ Any insurance products you already have in place or are provided by your employer
- ✓ Employer benefit investment statements (401(k), stock options, etc.)
- ✓ Tax returns for the past two or three years
- ✓ Personal retirement and investment account statements
- ✓ Information on any debt you have (credit cards, loans etc.)

www.cornerstonewealthtn.com

9:00 A.M. to 5:00 P.M. Mon-Fri

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Disclosures

Investment Advisory services offered through Cornerstone Wealth Management Group (Located in Greeneville, TN) - Registered Investment Adviser.