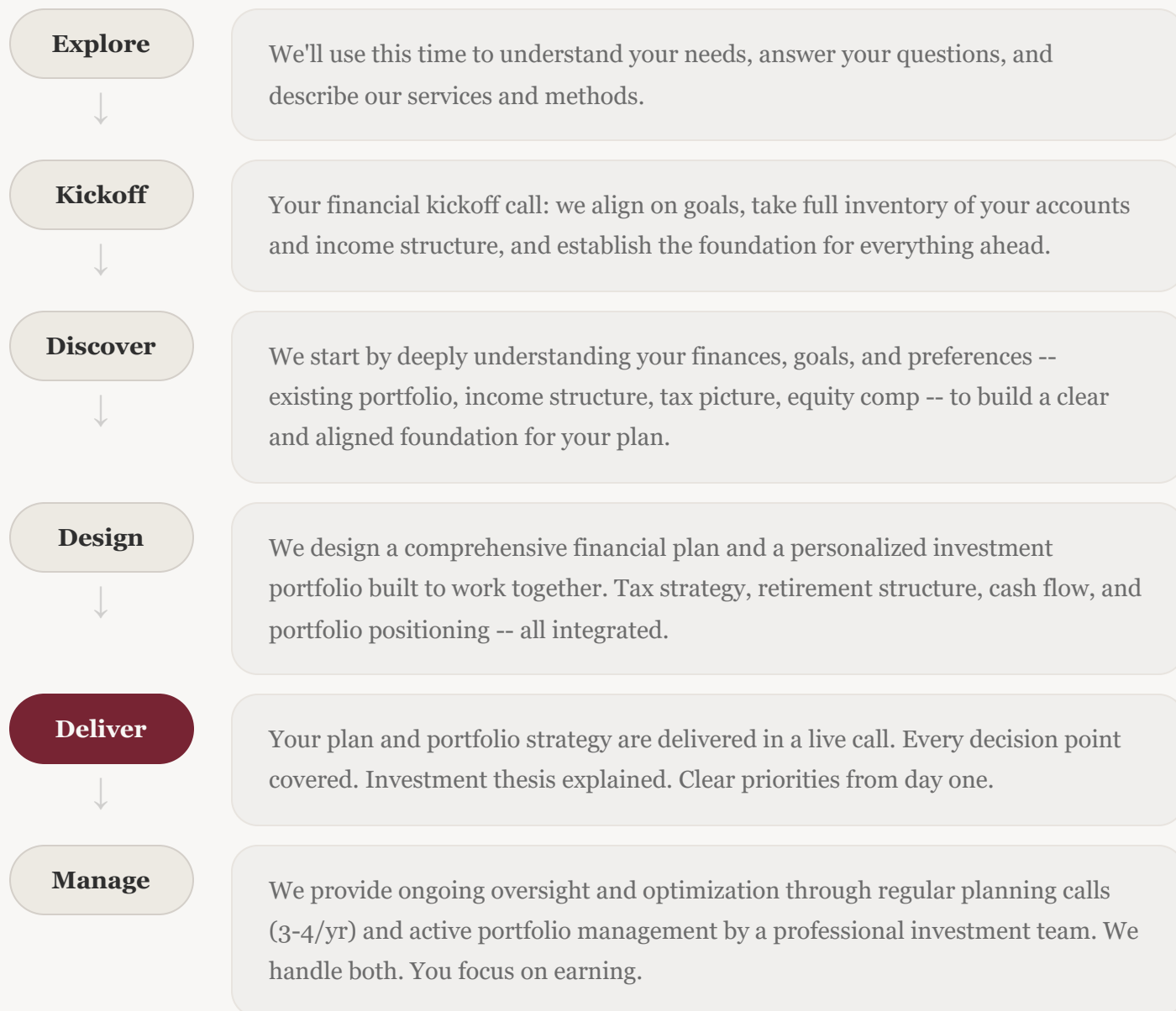


Wealth Management



Ongoing financial planning and investment management working together.
One relationship. Nothing operating in a silo.



Wealth Management

Areas We'll Cover

Tax Strategy

Retirement Planning

Variable Income

Investment Management

Cash Flow

Insurance & Risk

Estate Planning

Real Estate

Equity Compensation

Deferred Compensation

Pricing

Discounted AUM advisory fee. Tiers down as assets grow.

First \$250,000

0.80%

Next \$250,000

0.70%

Next \$500,000

0.65%

Next \$1,500,000

0.60%

Over \$2,500,000

0.55%

PLANNING FEE (BUNDLED)

\$2,500 – \$6,000 / yr

50% of standalone advice-only rate. Based on complexity.

\$5,000 all-in minimum.

Custom fee conversation for \$2M+ in assets managed.

Chris Brindle is an investment advisor representative. Brindle Financial is the marketing name used for his entity. Investment advisory and financial planning services are provided through Valor Investments and Planning, a Registered Investment Adviser. Investment management involves risk including loss of principal. Registration does not imply a certain level of skill or training.