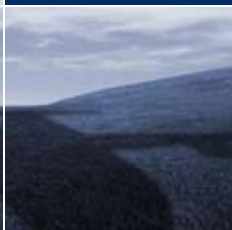


We explore and inspire
to build family wealth.



Crowe Wealth

Crowe Wealth Management, LLC



We explore and inspire to build family wealth.

Welcome to Crowe Wealth Management

At Crowe Wealth Management, our mission may sound simple, but it clearly describes our philosophy and guides us through the planning process. We can help you navigate the way through your wealth-building journey.

Our “explore and inspire to build” approach to helping you and your family is different. As a fee-only provider of family office services, our independent focus is on your best interests. We build relationships with your other advisors to make sure we are all united – progressing toward the achievement of your dreams.



Explore. Inspire. Build.

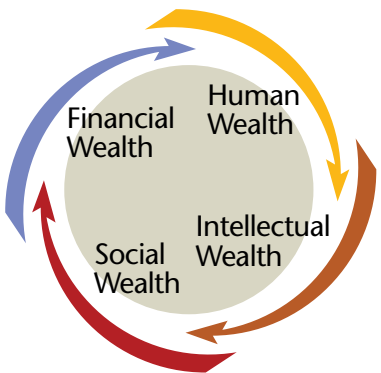
The cornerstone of an enduring wealth plan begins with exploring your past, present and future. We will challenge you to recall your past, take stock in the present, envision your dreams and plan for the future. We explore to find what is most important in your life.

Explore. Inspire. Build.

We all have had moments in our lives where we have been inspired to accomplish even the most difficult tasks. Crowe Wealth Management works to inspire you and your family to maximize long-term wealth. We inspire by creating a specific path that guides you – step by step – to imagine the possibilities and fulfill your dreams.

Explore. Inspire. Build.

Leave a legacy. This is a phrase you may hear often. But, what does it mean? We have found it means something different for each of our client families. After exploring your dreams and inspiring you to take action, we help you define and build your unique legacy to encompass your family's values.



Crowe Wealth Management introduces clients to the four components of wealth. These combine to create true family wealth.



Family Office Services

The “explore and inspire to build” approach is designed to support your family mission and vision. Our continuous process works to define your most important values.

Explore – Steps One and Two

- Define family mission, vision and values
- Understand goals and objectives
- Complete review of your current investment portfolio
- Analyze will, trust and incapacity documents
- Complete review of your insurance documents
- Analyze personal tax situation
- Project cashflow
- Review charitable planning
- Review family partnership and structure

Inspire – Step Three

- Review alternatives and recommendations
- Test feasibility
- Prioritize goals and objectives
- Coordinate implementation process
- Create step by step plan

Build – Steps Four and Five

- Assist in decision making process
- Implement plan to achieve goals and objectives
- Educate and update family members
- Build understanding of family wealth
- Monitor and revise plan as necessary

Benefits of Crowe

Wealth Management's Approach:

- **Comprehensive Services.** Your family gains a CFO for your family wealth
- **Family Advocate.** Solutions are developed that promote your family's mission
- **Collaborative Approach.** Integrated plans mutually developed by you, your other advisors and Crowe Wealth Management
- **Personalized Service.** Order is achieved out of complexity
- **Unified Strategy.** Generated from a continuous process and focused on the long-term
- **Resource Sharing.** Family members benefit as a whole instead of just individually
- **Back to Basics.** You and your family gain more time for quality of life
- **Generational Resource.** Family members can better understand the responsibilities of family wealth

Step 1
Goals & Objectives

Step 2
Facts & Circumstances

Step 3
Alternatives & Recommendations

Step 4
Decision Making & Implementation

Step 5
Monitoring & Revisions




Investment Advisory Services

In addition to comprehensive family office services, Crowe Wealth Management provides, in partnership with Oxford Financial Group, Ltd., investment consulting advice to individuals, families and institutional investors including retirement plans, foundations and endowments. Oxford provides unbiased and objective investment advice free from potential conflicts of interest because compensation is derived solely on a fee-for-service basis.

Crowe Wealth Management and Oxford Financial Group can help you confidently manage your investment decisions. You maintain discretion over your investable assets.

The five steps to our proven investment planning process include:

- 1 Assessments of your current position and of your ultimate goals and objectives.
- 2 Design and present an appropriate Asset Allocation Strategy.
- 3 Selection of Investment Managers/Alternative Investments using a “Manager of Managers” model.
- 4 Establishment of an Investment Policy Statement where appropriate.
- 5 Monitoring of ongoing Investment Performance, Manager Investment Style and Organizational Stability.



We deliver competent, objective and timely advice as your independent advocates. Each recommendation we offer is intended to protect and grow your financial wealth. You will benefit from our highly personalized, confidential and professional approach designed to achieve your investment goals in the context of your overall comprehensive financial plan. We can help you move from success to significance.



Crowe Wealth[®]

Crowe Wealth Management, LLC

For more information, please call us at 888.276.9396
or visit our website at www.crowewealth.com.