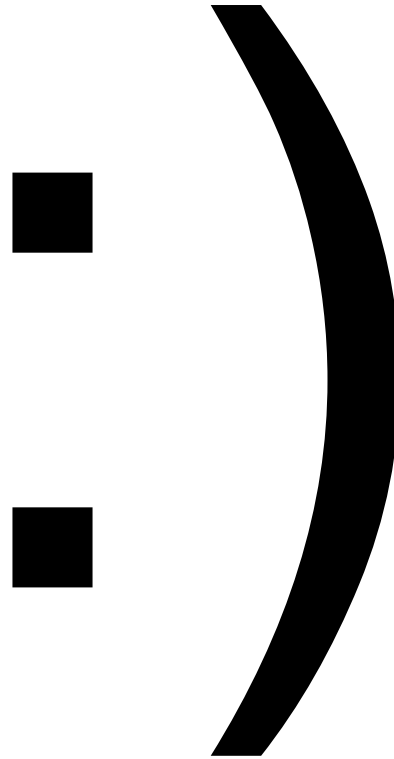


“planners love charts,
clients love stories”



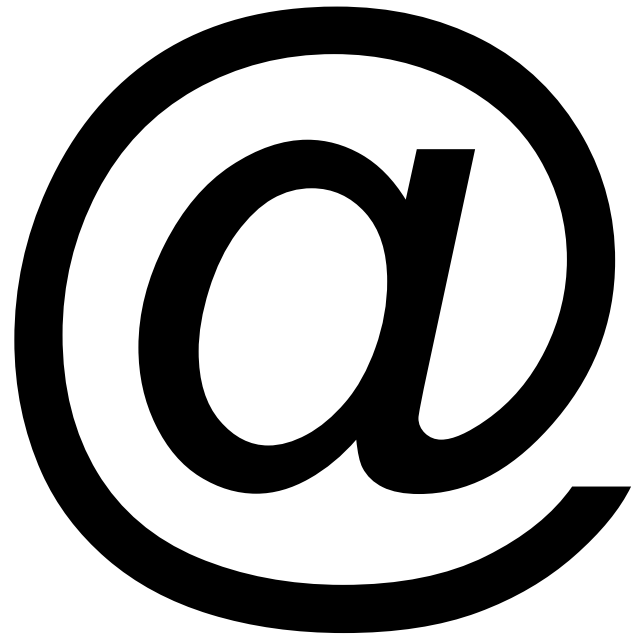
Additional details are not shared to maintain confidentiality.

“relationships under management
not assets under management”



Additional details are not shared to maintain confidentiality.

“you wanna see my desktop,
here it is (stickies on the table)”



Additional details are not shared to maintain confidentiality.

“I printed the steps to print the new account form”



Additional details are not shared to maintain confidentiality.

“We created our own paper checklist to make sure everything is complete”



Additional details are not shared to maintain confidentiality.