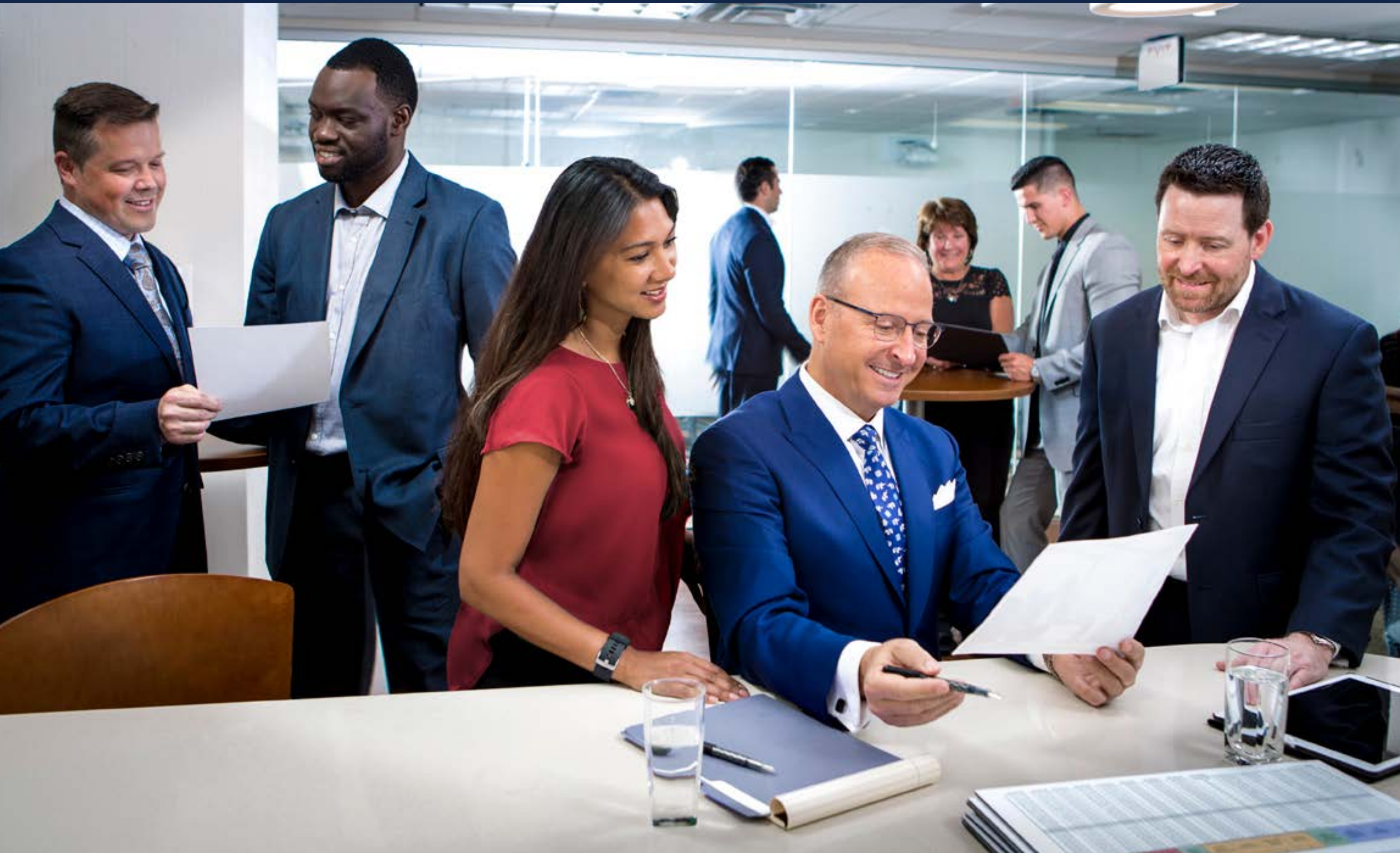
Poise Wealth

POISE WEALTH



TRUST

IN THE FINANCIAL FUTURE WE HELP SECURE

Your life's work and intentions deserve the proper attention and planning to help provide for you, your family, and community.

Our dedicated team of professionals collaborate with you and your advisors to first understand and then develop clarity around your goals, dreams, desires and aspirations.

Together, we will design a Plan that will align your actions with your intentions.

It's a commitment you can **TRUST US** to deliver.

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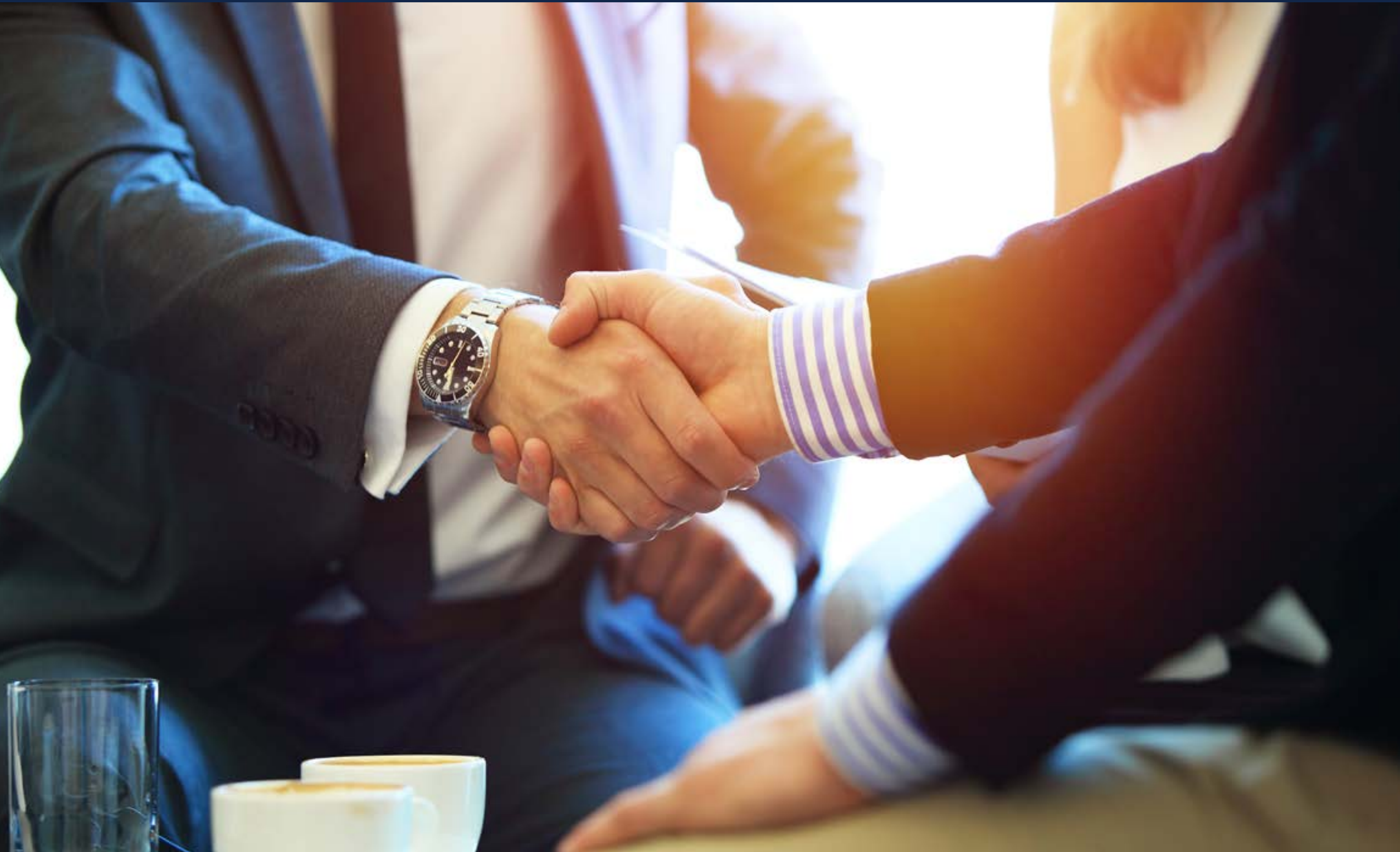

TRUST

IN WHO IS SITTING AT YOUR TABLE

Of all the decisions you will make, choosing the right wealth planning team is possibly one of the most important. At Poise Wealth, we simplify complex financial planning strategies and provide you with the knowledge and tools to make informed decisions.

As fiduciaries, we are held to the highest standard of care and are required to act in the best interest of our clients at all times.

Poise Wealth is part of a larger nationwide network of professionals backed by the financial strength of Bleakley Financial Group. We are ready to serve you, your family and your legacy — now and for generations to come.

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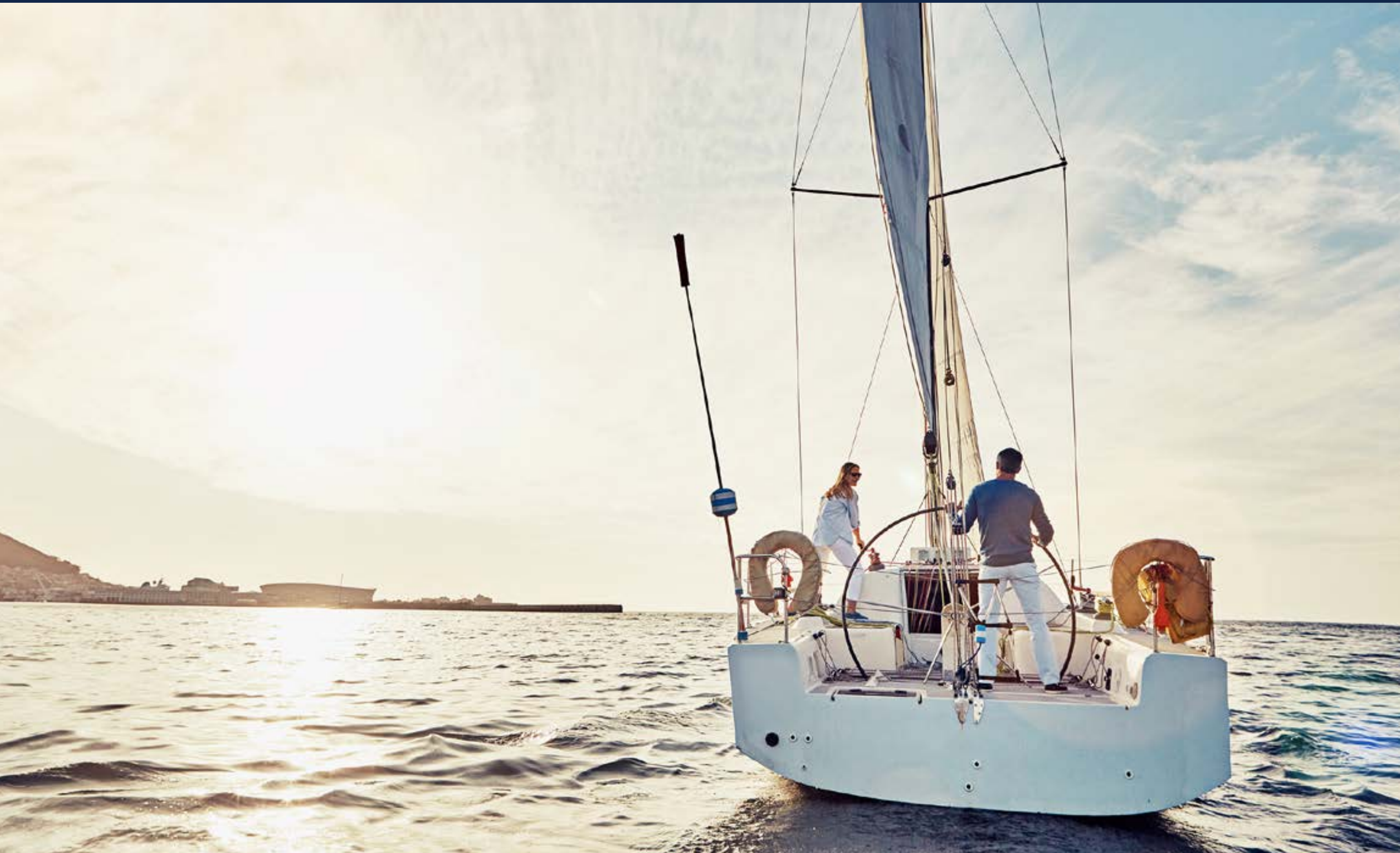

TRUST

OUR PLANNING STRATEGIES

Your Plan will include investing time and energy for your family's future legacy in one or more of the following meaningful and impactful areas: Minimized Estate Taxes • Irrevocable Trust, Dynasty Trust or Grantor Trust Planning • Intergenerational Wealth Planning • Tax-Efficient Investing

Together, we will ensure your Planning Strategy is aligned with your goals, timeline and tolerance for risk. Our goal is for: You to Benefit from Feeling Confident that your Life's Work will continue to bring Value to your Family and Community.

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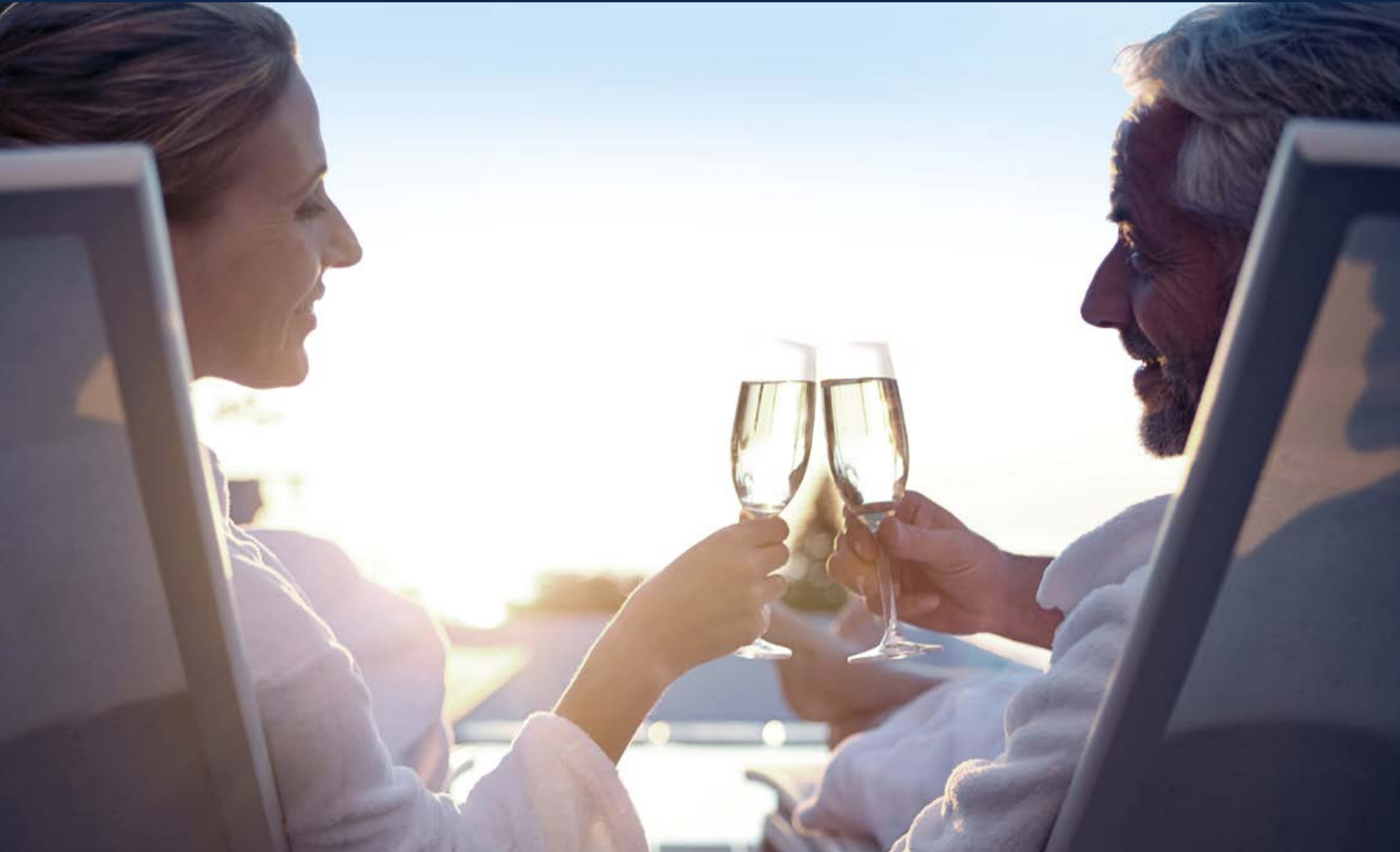
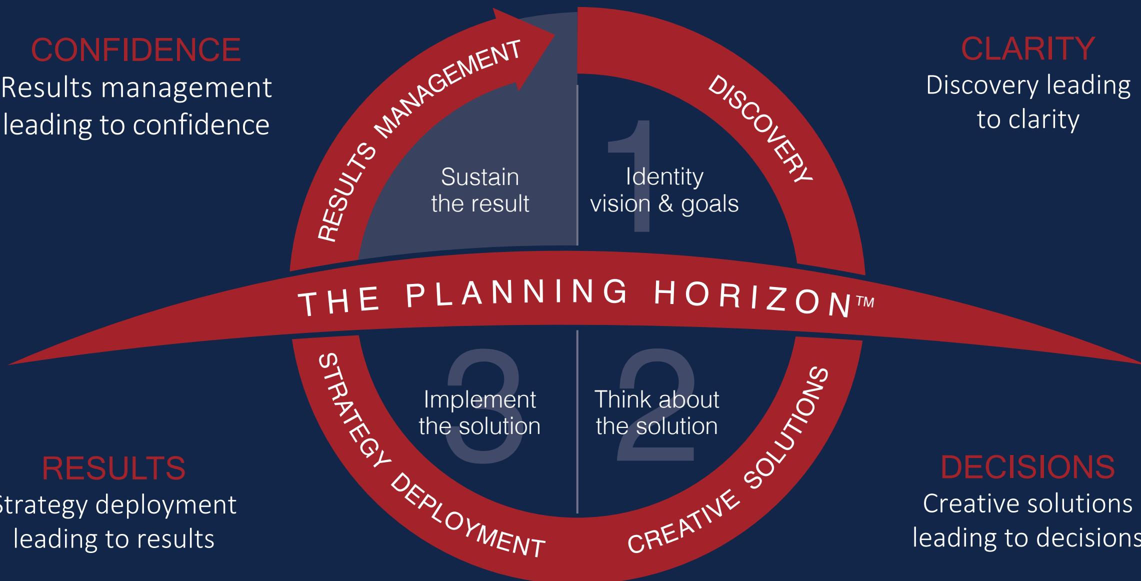


TRUST

IN VALUES-BASED PLANNING

CONFIDENCE
Results management leading to confidence

CLARITY
Discovery leading to clarity



RESULTS
Strategy deployment leading to results

DECISIONS
Creative solutions leading to decisions

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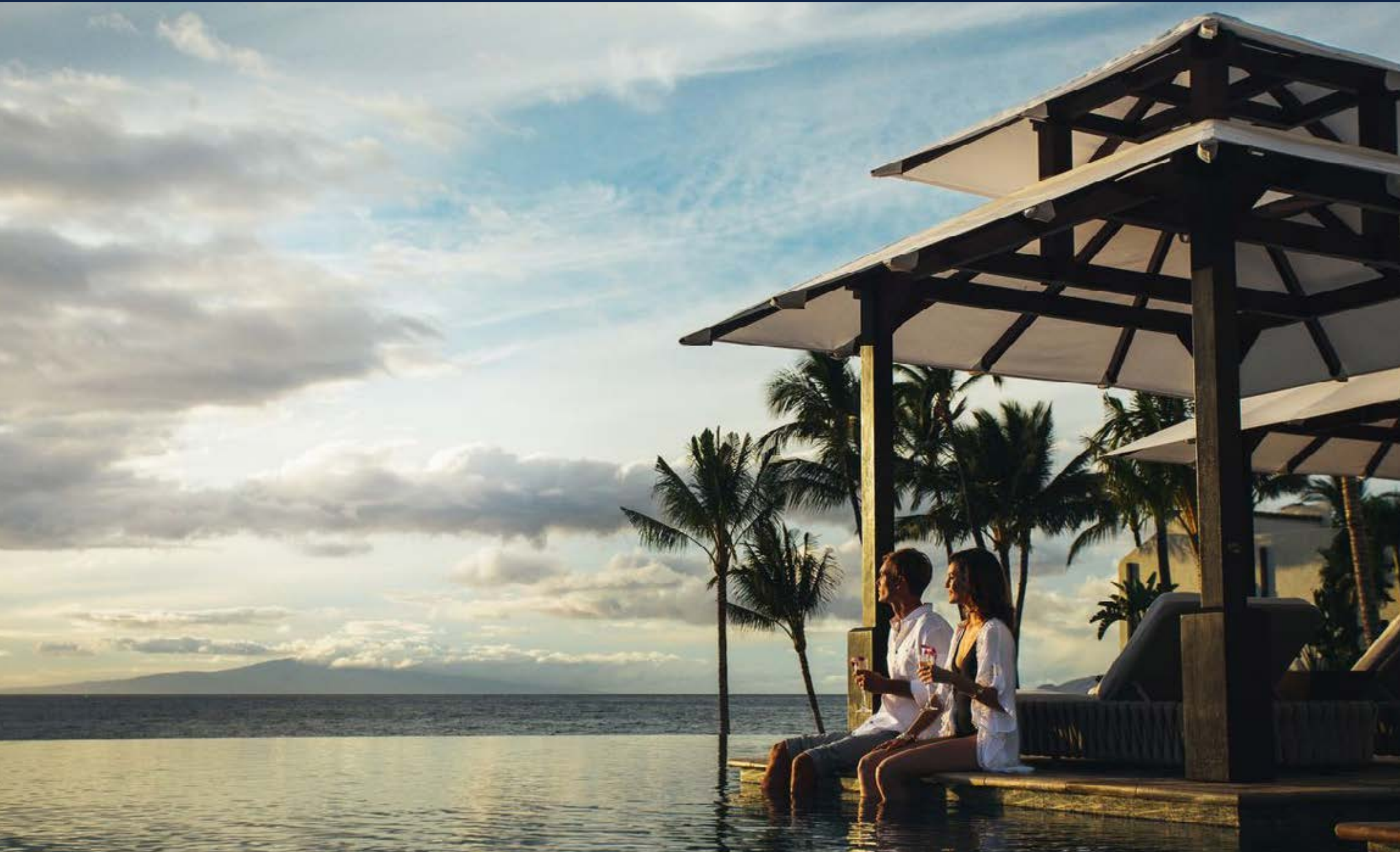

TRUST

IN THE NATURAL PRIORITY OF WEALTH PLANNING

Creating your unique Plan involves a three-pronged approach:

- **FINANCIAL INDEPENDENCE** We will develop solutions to meet your retirement and other personal goals to help ensure your financial well-being.

- **FAMILY LEGACY** Guided by your personal values, we will work together to create a legacy plan that will reflect "you" while providing financial and educational planning for generations to come.

- **SOCIAL CAPITAL** Together, we will design and develop your philanthropic vision and bring it to life with a focus on long-term asset preservation.

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TRUST

IN OUR SUPPORT TEAMS

- CONCIERGE PLANNING Ability to access a team of professionals including estate and business planning attorneys, as well as individuals with advanced financial planning and investment management certifications to further design, implement and integrate your customized business, estate, legacy and financial planning needs.

- PRIVATE CLIENT SERVICES INVESTMENT TEAM and ADVISORY INVESTMENT TEAM Providing customized investment management services to address our clients' unique needs with access to multi-investment custodians while delivering consultative advice through enhanced portfolio analytics and investment research.

- TRUST SERVICES TEAM Select group of teams providing administration for a variety of trusts, which may encompass investment management, trust administration and distribution. They also monitor the ever changing income and estate tax laws and are a resource to discuss how it may impact trust planning.

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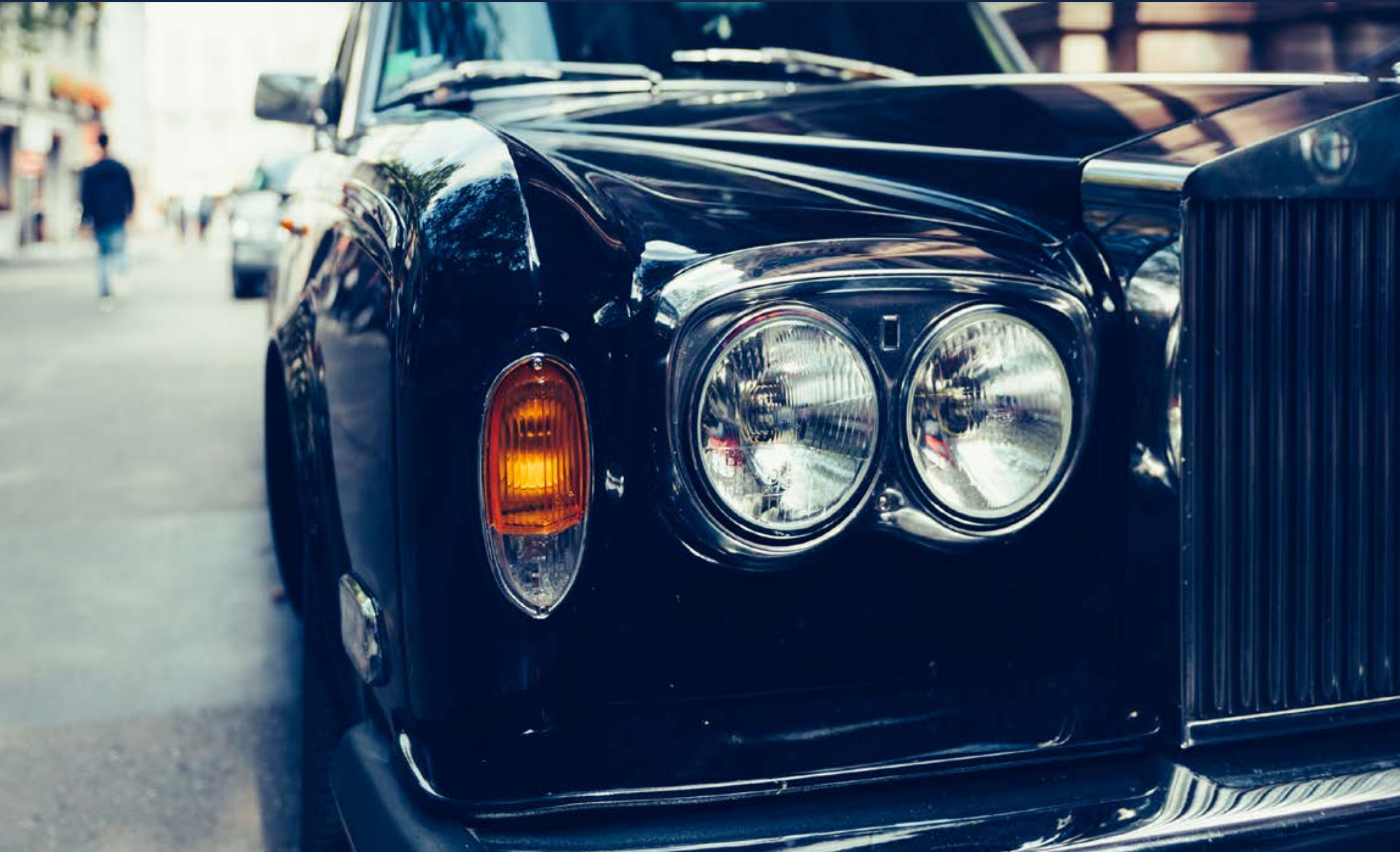

TRUST

IN OUR DEDICATION TO YOUR SUCCESS

At Poise Wealth, **we serve our clients.** Our team of knowledgeable advisors is thorough, creative and ethical. We care about your unique goals and work hard to implement solutions ensuring the best kind of success — yours. **TRUST US.**

DREW BESONSON & TEAM

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Bleakley
FINANCIAL GROUP™