Tailoring Strategies to Manage Your Financial Future

Introducing a Second-Opinion Service

Exclusively for clients, friends, family and associates of our valued professional relationships

In this challenging economy, you probably know a friend, family member or colleague who may be in a complex situation or is just unhappy with the advice from his or her financial advisor—it's not uncommon. We believe that many high-net-worth individuals would value a second opinion on their finances.

To help the people you care about achieve their financial goals, we have created a *complimentary* second-opinion service. I'm pleased to offer your friends, family members and associates the same expertise and guidance that clients of US Wealth Management experience.

Working with a team that redefines Wealth Management

Ask ten people to define wealth management. Actually, ask ten financial advisors to do so. You will likely get a variety of answers, with most *focused solely on investing*. However, I believe clients of US Wealth Management benefit from a team that has demonstrated the clear and comprehensive vision of wealth management illustrated below.

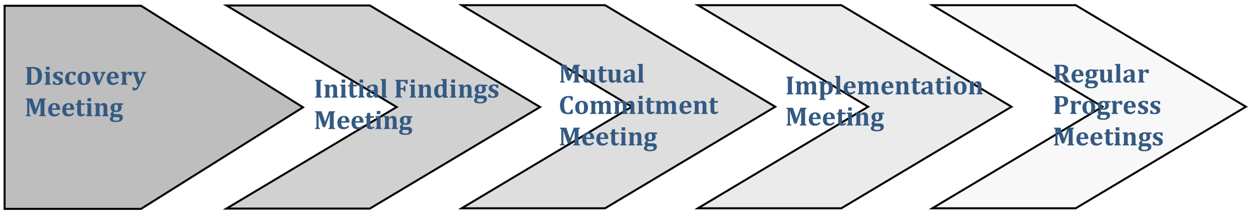
Comprehensive Wealth Management

Investment Consulting	+	Advanced Planning	+	Relationship Management
• Asset allocation • Portfolio management • Manager due diligence • Risk evaluation • Performance analysis		• Wealth enhancement, including cash flow management and tax minimization • Wealth transfer • Wealth protection • Charitable giving		• Regularly scheduled calls, reviews and in-person meetings • Team of professionals, including legal, tax, insurance and investment advisors

Our consultative process

We approach each new engagement with our consultative process. This allows us to have an open dialogue in which we learn about every client's values and goals while working with them to *tailor strategies to manage their financial future*. This complete Wealth Management Process is outlined in the steps below. Through our second-opinion service, your friends, family members and associates can enjoy a portion of this experience at no cost.

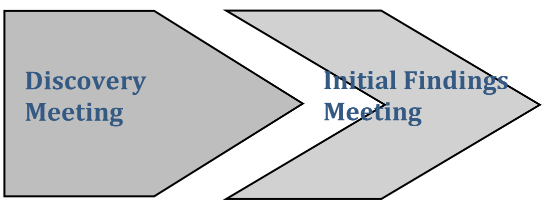
Full client experience



What to expect from our second-opinion service

I will meet with your friends, family members and associates for our in-depth Discovery Meeting focusing on their values and goals. Assuming we both agree that we have a basis for working together, we will analyze their situation and follow up with the Initial Findings Meeting. Hopefully, we can confirm they are on track to fulfill their values and achieve their goals with their current financial provider. However, if needed, we will suggest ways in which we can help, including recommending another provider if we are not a good fit for their needs. Either way, they will receive a Personal Life Profile chart and a personalized written analysis of their current situation.

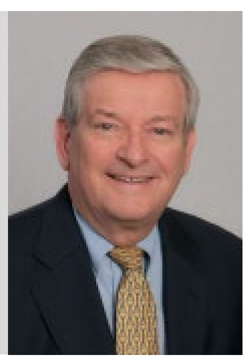
Second-opinion service



Let us assist you in helping those you care about. Contact me today.

US Wealth Management
30 Braintree Hill Office Park, Suite 202
Braintree, MA 02184
Office or Text: 781-884-2345 Cell: 617-990-4593
gclarke@uswealthmanagement.com

George T. Clarke, CPA/PFS, MSF
Financial Planner | Private Wealth Manager
www.uswealthclarke.com



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