

THE EWM NEW CLIENT EXPERIENCE



Econ Wealth
Management

ONBOARDING

- Client Portal Access
- Information Gathering
- Risk Assessment
- Signatures
- Account Openings
- Transfer of Assets



WHAT TO EXPECT NEXT!

With Econ Wealth, you're with a team where someone you know will answer the phone, be available, help you with household chores (seriously!), and create a customized financial experience for you, then Econ Wealth Management may be exactly what you're looking for. As a **FIDUCIARY**, our goal is to provide you with the peace of mind you deserve while being your guide on the journey to your goals and dreams. You will experience the highest level of service from our team during your lifetime as a client.



INVESTMENT STRATEGY

- Investment Goals
- Investment Planning
- Income Needs
- Verify Risk

PLAN PRESENTATION

- Retirement Projections & Plan Results
- Portfolio Recommendations
- Coordinate with CFP® Professionals
- Cash Flow Planning
- Meeting Schedule Presented



Econ Wealth Management

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Scan to view our website.

ECON WEALTH LIFETIME SERVICES



	Services	 FOUNDATION	 PATHWAY	 PINNACLE
E N G A G E	Client Events	Large Group Events	Small Gatherings	Exclusive Events
	Operations Updates	Select	Annual Review	Custom Phone Call
	EconXChange Access	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	In Touch Communication	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Client Portal Access	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Full Service Team Support		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Stock Stories			<input checked="" type="checkbox"/>
	Individualized Team Access			<input checked="" type="checkbox"/>
I N V E S T	Active Asset Management	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	External Account(s) Review	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Core ETFs	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Individual Stocks	Optional	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Select Strategies		Need based	Plan Specific
	Tactical Holdings			<input checked="" type="checkbox"/>
P L A N	Annual Reviews	Email/Phone	In-Person	Custom
	Personal Reports	Annual	Semi Annual	Quarterly
	Financial Plan	Allocation Plan	Goals Plan	Full Plan
	MoneyGuide Pro Access	Select	View Only	Full Access
	IRA Contribution Review	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Capital Gains Update	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Tax Planning	As needed	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Insurance Planning		Annual Review	Comprehensive
	Estate Planning		Annual Review	Comprehensive
	Cash Flow Planning			<input checked="" type="checkbox"/>
Tactical Review Call			<input checked="" type="checkbox"/>	

Important Disclosures: Econ Wealth Management is not engaged in the practice of law or tax preparation and no comments should be construed as legal and/or tax advice. Estate planning and tax information provided is general in nature. Always consult an attorney or tax professional regarding your specific legal or tax situation. EWM is not engaged in the practice of insurance sales and no comments should be construed as advice on your insurance needs. Please consult an insurance professional for this subject matter. Different types of investments involve varying degrees of risk. All investment strategies have the potential for profit or loss. ETFs combine features of a mutual fund, which can be purchased or redeemed at the end of each trading day at its NAV per share, with the intraday trading feature of a closed-end fund, whose shares trade throughout the trading day at market prices. An ETF's market price may trade at a premium or a discount to its underlying value. Before investing in an ETF, you should read both its summary prospectus and its full prospectus, which provide detailed information on the ETF's investment objective, principal investment strategies, risks, costs, and historical performance (if any).