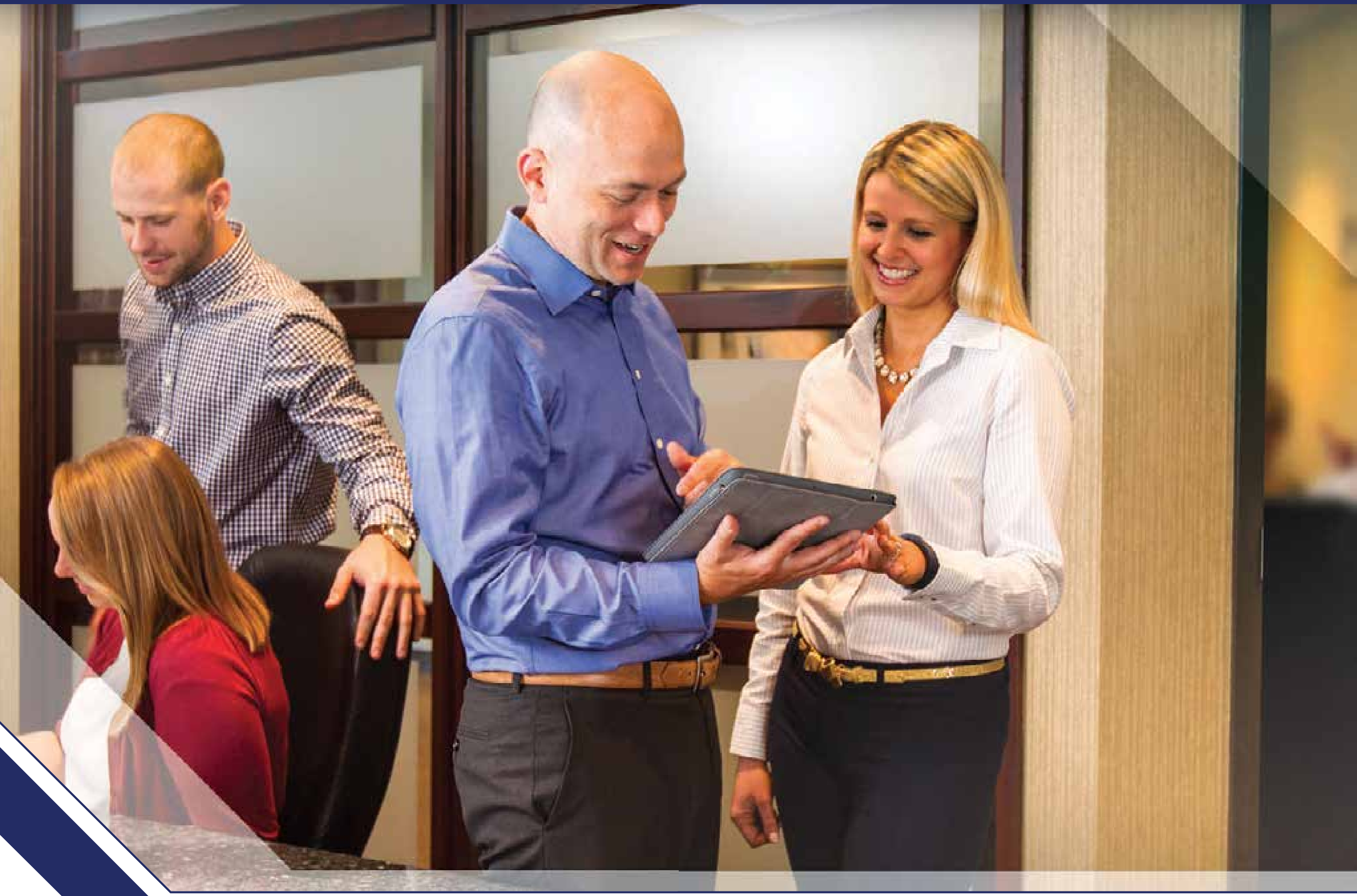
PLANCORP™

Your Financial Life Advocate.



Wealth Management

The Plancorp Process

At Plancorp, we're more than your advisors—we're your financial life advocates.

We do more than just create a plan and invest assets. We proactively give advice in all aspects of your financial life, from financial planning, to multi-generational estate planning, to investment management and more.

Becoming a Client

To us, success happens when your vision of the future becomes reality.

We'll start by taking a comprehensive look at all aspects of your financial life to help you refine your goals. Every client's onboarding experience is unique, and we'll work directly with you to determine the best plan and pace for your needs. ***Here is a general overview to give you a sense of what to expect.***

Discovery

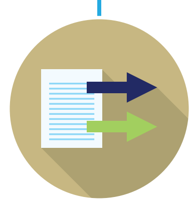
During this meeting, we'll discuss why you're seeking advice. What is it that's driving you to talk with us? Why now?

Total Client Profile

Summarizes where you've been, what's important to you and your goals for the future.

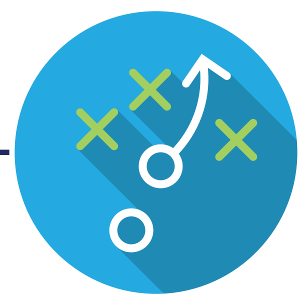
Mutual Commitment

We'll review where you are today, discuss a financial plan and share our investment philosophy.



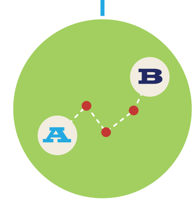
Investment Policy Statement

Ensures we're completely aligned on investment strategy and process.



Onboarding

We'll create an action plan based on your risk tolerance and financial goals. Then, we'll work with you to achieve them.



Client Dashboard

Acts as a road map for executing your financial life plan.

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Ongoing Service

Just as your financial life continually evolves, we believe your financial plan should also be a living, breathing document. When it comes to all matters of your financial life, we hope we are your first phone call.

Proactive Planning

We'll regularly review your estate plan, income tax plan, insurance, education funding and charitable planning.

Coordination with Outside Professionals

To best execute your financial life plan, we'll work with your entire team of advisors—including your CPA, attorney and insurance professional.

Financial Independence Review

We'll meet with you regularly to review your total financial picture, long-term plan and portfolio performance.

Rebalancing & Tax Loss Harvesting

Our investment team will evaluate your portfolio at least monthly to determine if any action is needed.

At Plancorp, advocacy means more than simply outlining a financial plan or asset allocation. It means partnering with our clients, building relationships and always placing their interests ahead of our own.

That's been our philosophy since we opened in 1983, and the sentiment still drives every decision we make. After more than three decades of helping individuals, families and business owners plan for financial independence, our commitment to serving as financial life advocates is stronger than ever. We have no commissions, no hidden fees and no hidden agendas.

In order to partner with you in all aspects of your financial life, Plancorp specializes in four areas of expertise:

- Financial Planning and Wealth Management
- Retirement Plan Advisors
- Exit Strategy Advisors
- Institutional Asset Management

Contact us to learn more about our unique approach or to schedule a complimentary, no-obligation meeting.

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