Aprio Wealth Management

Passionate for what's next®

Aprio Wealth Management

Financial planning and investment management that delivers coordination, clarity and confidence.

Aprio
Wealth Management

A better wealth management client experience

Where we end up in life is dictated by the decisions we make along the way. This is especially true when it comes to managing your wealth. That's why we all need advisors. However, acting on good advice shouldn't create more work for you. After all, you are the client.

At Aprio we've created an easier way to manage wealth. We integrate investment management, financial planning and tax services to help you achieve your goals.

Coordination
of advisory activities in a timely and efficient fashion.

Clarity
to understand how each aspect of your financial picture effects the others.

Confidence
that you have the information you need to take action.

Coordinated investment management, financial planning and tax services

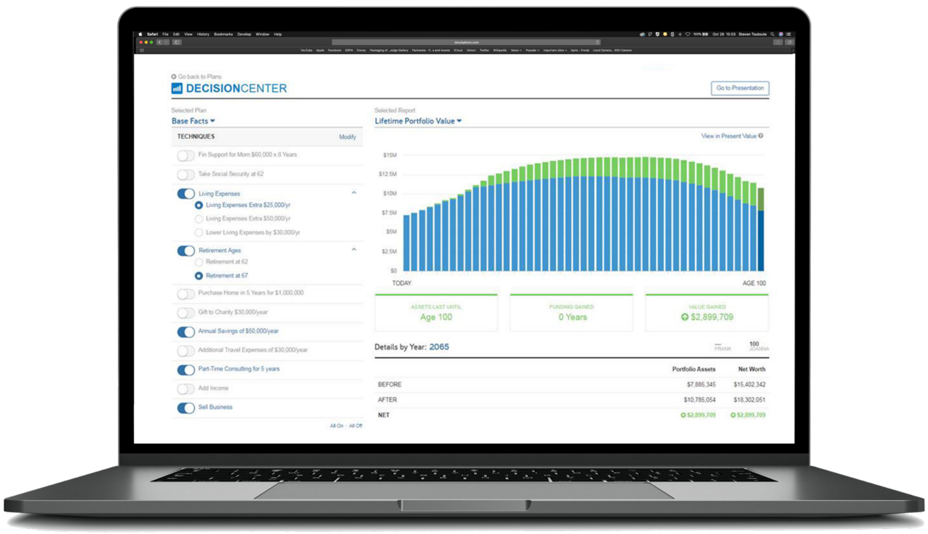
Effective wealth management requires ongoing collaboration between your investment advisor, financial planner and tax advisor.

Why? Because investment activity can impact your taxes. The taxes you owe impact your financial planning. And your investment strategy, assets and liabilities influence financial planning decisions.

At Aprio, our team of advisors enable a collaborative and coordinated client experience. Our approach delivers better advice that considers all aspects of your financial life and the convenience and ease that gives more time to do the things you truly enjoy.

Aprio advisors share information and coordinate activities under one roof to provide a better client experience.

Clarity – A visual understanding of your financial picture



Your goals and progress

Your personal balance-sheet

Your cash flow

We leverage a secure personal financial portal to provide a single view of all of your financial accounts, assets and liabilities, as well as access to all of your important financial documents.

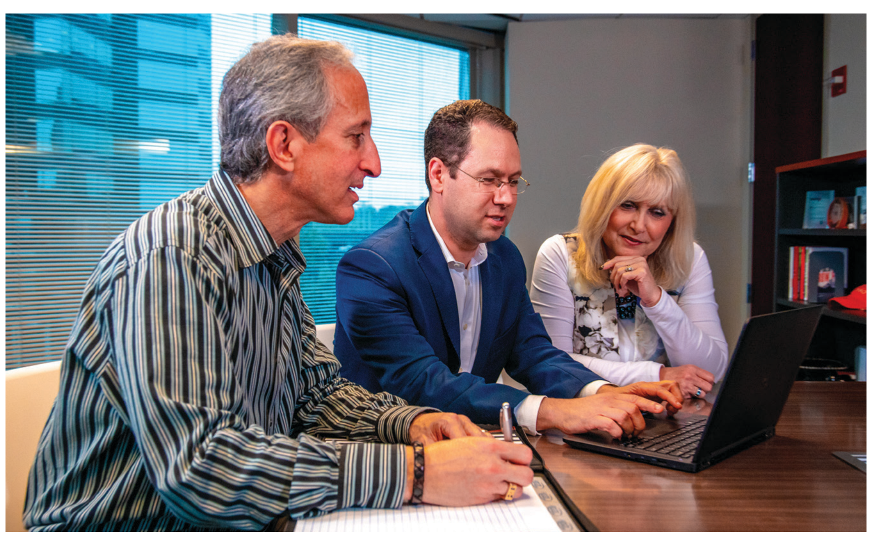
Visual dashboards enable real-time collaboration between you and your Aprio advisors, providing a visual understanding of your current financial position, and the potential impact of different decisions.

Confidence – Turning "what if" into "what's next"

Life comes with a lot of "what if" questions. "What if I sell my business next year? What if I want to retire early? What if we buy a bigger house? What if we send our kids to private school?"

We are able to explore different scenarios and "what if" questions with ease, so you can:

- **See how potential life decisions can impact your financial plan over time.**
- **Get faster answers because we have the necessary information to respond to your questions.**
- **Make important financial decisions with confidence.**



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We stay connected – so you stay on track

Life never moves in a straight line and things change, so we stay connected with our clients throughout the year. Here is an example of what you can expect:

Spring tax planning and preparation meeting – We update your balance sheet with any changes that might have occurred since our last meeting. We discuss cashflow projections and goals for the year ahead.

Fall planning meeting – We discuss any adjustments needed to take advantage of year-end tax opportunities, like charitable giving. We also look at longer term strategy.

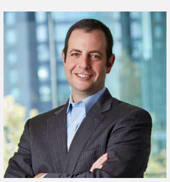
Quarterly reports – Throughout the year we provide quarterly investment reports that make it easy to see how your portfolio is performing. And of course, we are always available to answer questions.

Goal-oriented investment approach

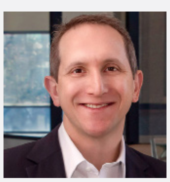
We focus on outcomes. Our coordinated approach enables us to understand how to better align your risk profile and strategy to meet your goals. Aprio Wealth Management, LLC is a fee-only Registered Investment Advisory. We serve our clients as fiduciaries.

- Long-term investment strategies using global asset allocation with low-cost ETFs and mutual funds
- Investments are held in custody at Charles Schwab
- We are transparent and independent
- No proprietary products or hidden fees

Meet the team

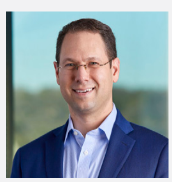


Keith Greenwald
Partner-in-Charge, Private Client Services

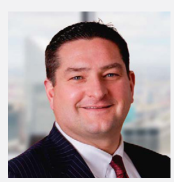


Simeon Wallis
Chief Investment Officer

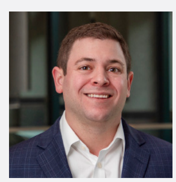
Carolyn Cope
Director of Operations



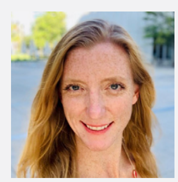
Davi Kutner
Partner, Managing Director



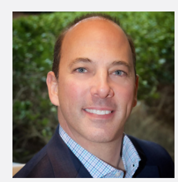
Richard Schriefer
Partner, Managing Director



Marc Leven
Wealth Advisor



Madeleine Batson
Director of Tax, Wealth Management



Scott Barnas
Senior Financial Planner

Let's define the future together

Since the founding of our affiliated CPA firm, Aprio, LLP, in 1952, the Aprio companies have focused on helping our clients make more money and keep more of the money they make. Aprio Wealth Management continues this tradition. We are committed to investing in the best talent and technology to provide you the very best service experience.

To learn more about how Aprio Wealth Management can help you reach your financial goals, contact:

Davi Kutner
(770) 353-5919
davi.kutner@aprio.com

Richard Schriefer
(646) 859-8158
richard.schriefer@aprio.com

Marc Leven
(770) 353-3152
marc.leven@aprio.com