Cost to you

Your Risk

EWM Services

Your Goals

Econ Wealth Management

A CLEAR UNDERSTANDING OF EWM COSTS & SERVICES

Client Household Total Assets	Fee Rate	Assets Cont'd	Fee Rate
<$250K	2.00%	$2M - $3M	0.95%
$250K - $500k	1.75%	$3M - $4M	0.80%
$500K - $750K	1.50%	$4M - $5M	0.70%
$750K - $1M	1.25%	$5M - $10M	0.60%
$1M - $2M	1.10%	>$10M	0.50%

Annual Fees **2.00% or less**

Econ Wealth Management

Cost to you

Your Risk

EWM Services

Your Goals

Econ Wealth Management

ASSET MANAGEMENT

EWM'S Investment Selection Guide

EWM'S Technical Analysis Guide

EWM'S Portfolio Guide

Keeping your Assets Safe

PLANNING

We Plan for You

We Educate You

Annual Check Ups

OPERATIONS

Providing you Income

Digital Platforms for You

Online Access of your Accounts- Schwab Alliance

Econ Wealth Management

COMPLIANCE

Form CRS

Discretionary Agreement

Form ADV All Parts:
Informational Brochure

Fiduciary Duty

MARKETING

Econwealth.com

Overtimesports.net

SPECIAL SERVICES

Microsoft Teams Meeting Instructions

Community Outreach

Added Value to your Experience

Econ Wealth
Management

Cost to you

Your Risk

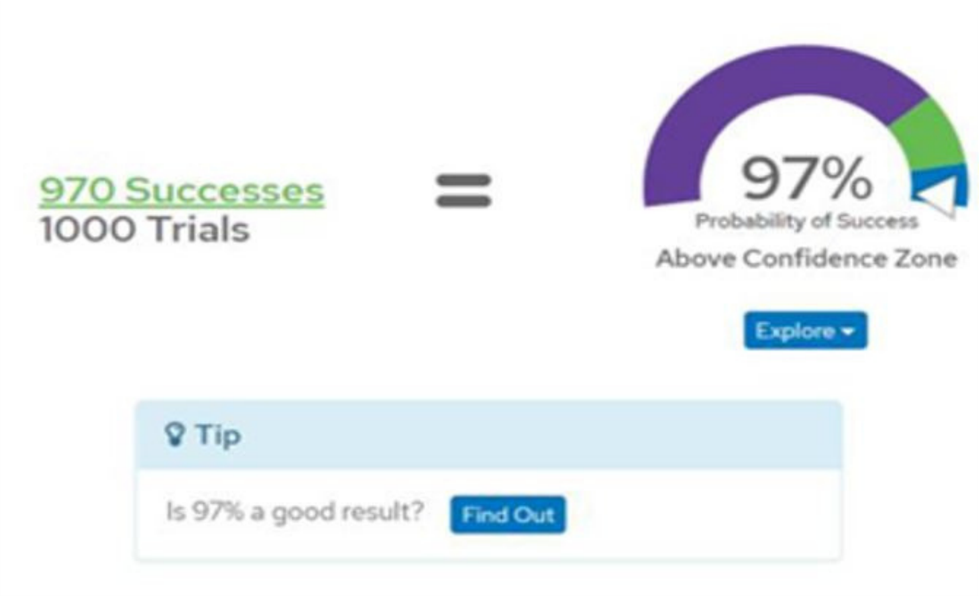
EWM Services

Your Goals

Econ Wealth Management

WHAT ARE YOUR GOALS?

Retirement	Health Care	New Home	Travel	Car	Leave Bequest	Major Purchase	Provide Care
Home Improvement	Gift/Donation	Celebration	College	Wedding	Private School	Start a Business	Anything Else



Econ Wealth Management

Cost to you

Your Risk

EWM Services

Your Goals

Econ Wealth Management

ASSET MANAGEMENT

EWM Core Portfolios
ETFs + Stocks

Conservative	Balanced	Growth
20 - 50% Equity 50 - 80% Fixed Income	50 - 75% Equity 25 - 50% Fixed Income	75 - 100% Equity 0 - 25% Fixed Income

EWM Market Variety Portfolios

Balanced Allocation	Managed Growth	Capital Appreciation	Exclusive
Income Focused Lower Risk Tolerance	Equity Focused Moderate Risk Tolerance	Growth Focused Aggressive Risk Tolerance	Custom Portfolio Specific Planning Needs

EWM Strategic Portfolios
ETFs + Stocks

Conservative	Balanced	Growth
20 - 50% Equity 50 - 80% Fixed Income	50 - 80% Equity 20 - 50% Fixed Income	80 - 100% Equity 0 - 20% Fixed Income

Risk Profile	Target Returns *
Conservative	4-6%
Moderately Conservative	5-7%
Moderate	6-8%
Moderately Aggressive	7-9%
Aggressive	8+ %

*all return targets are long term (12 + months)

Econ Wealth Management

IMPORTANT DISCLOSURES

Information presented is believed to be factual and up to date, but we do not guarantee its accuracy and it should not be regarded as a complete analysis of the subjects discussed. All expressions of opinion reflect the judgment of the author/presenter as of the date of publication and are subject to change and do not constitute personalized investment advice. A professional advisor should be consulted before implementing any investment strategy. Investments are subject to market risks and potential loss of principal invested, and all investment strategies likewise have the potential for profit or loss.Different types of investments involve varying degrees of risk, and there can be no assurance that any specific investment or strategy will be suitable or profitable for a client's portfolio. All investment strategies have the potential for profit or loss. Past performance may not be indicative of future results. No current or prospective client should assume that the future performance of any specific investment, investment strategy (including investments and/or investment strategies recommended by the advisor), will be equal to past performance levels.The information presented herein is intended for educational purposes only and is in no way intended to be interpreted as investment advice.

Econ Wealth Management

4755 Lingelstown Rd. Suite 204
Harrisburg, PA 17112
(717) 545-5870

ECON WEALTH MANAGEMENT

258 E. Main St.
Hummelstown, PA 17036
(717) 545-5870