ECON WEALTH MANAGEMENT

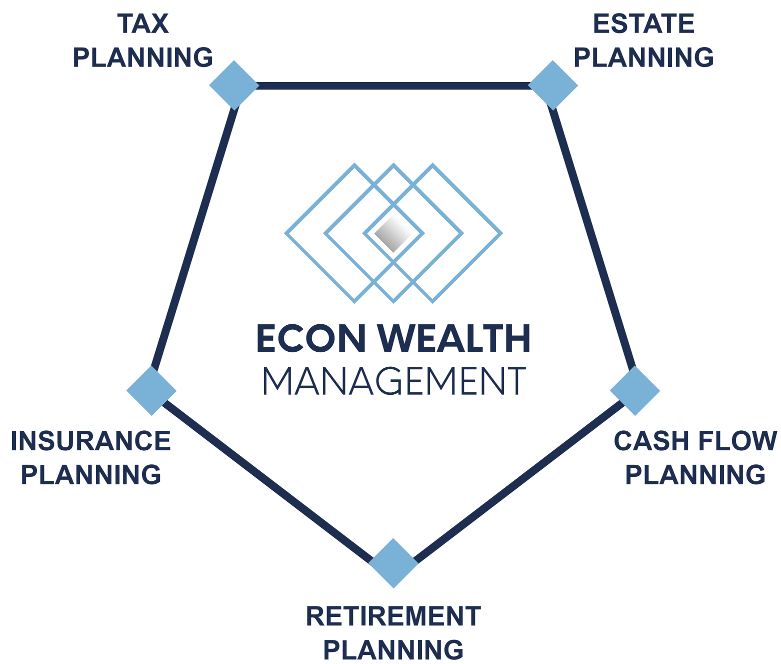
FIVE POINT PRECISION PLANNING

A PLAN AS UNIQUE AS YOU ARE

We believe financial planning should be comprehensive and personal. Our Five Point Precision Planning process brings your financial life together into one coordinated plan so you can pursue your goals with greater clarity and confidence

Our Five Points of Focus

- **Tax Planning**
  - Identify opportunities designed to improve tax efficiency.
- **Estate Planning**
  - Coordinate strategies to help protect your legacy and those you care about.
- **Cash Flow Planning**
  - Align today's financial needs with tomorrow's goals.
- **Retirement Planning**
  - Build a strategy designed to support the retirement you envision.
- **Insurance Planning**
  - Evaluate protection needs for you family, assets, and financial plan.



These five areas work together. By coordinating each one, we create a financial plan designed around your life today and your goals for tomorrow.

How We Bring Your Plan To Life

Proactive Guidance

We stay connected throughout the year with timely insights, resources, and conversations to review progress, address changes, and keep your financial plan current.

Team Collaboration

Our planning, investment management, and operations teams work together to evaluate opportunities and coordinate the details of your financial life.

Advanced Planning

We use planning technology to model financial scenarios, stress test your plan, and evaluate how changes may affect your financial future.

One Plan. Five Points. Your Future, Planned with Precision.