



NAVIGATING *The Markets*

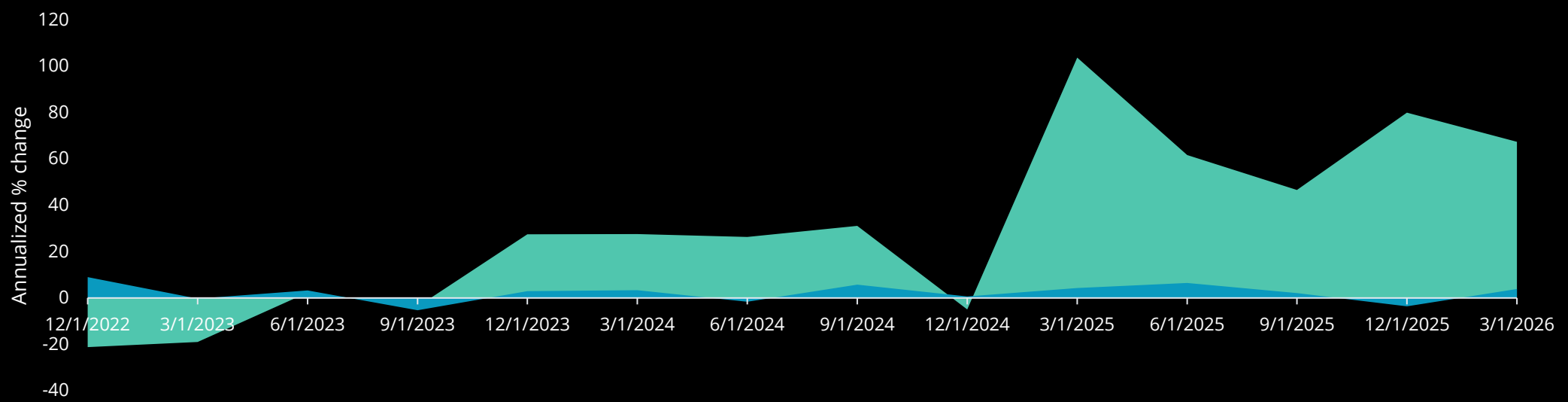
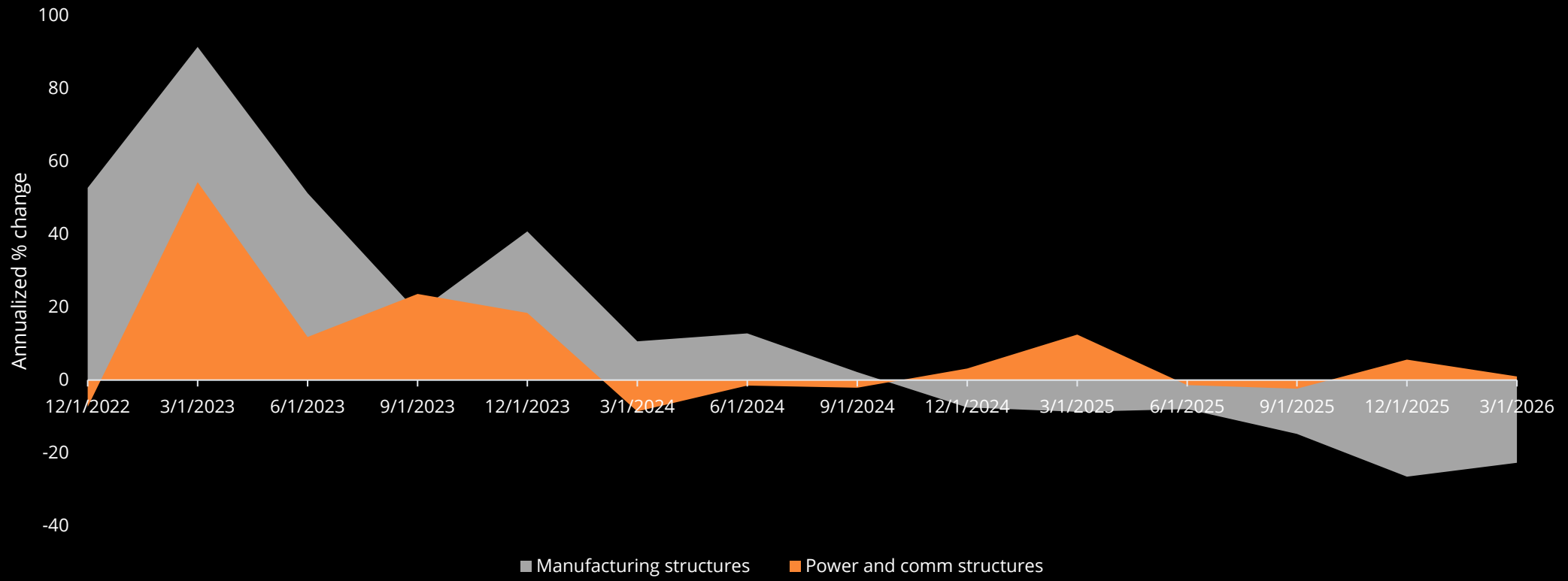
ANNEX
WEALTH MANAGEMENT
Know The Difference™

Brian Jacobsen, PhD, JD, CFA®, CFP®, CAIA, CBE

CHIEF ECONOMIC STRATEGIST

The information and/or the materials provided as part of this program are intended and provided solely for informational and educational purposes. None of the information and/or materials provided as part of this power point or ancillary materials are intended to be, nor should they be construed to be the basis of any investment, legal, tax or other professional advice. Under no circumstances should the audio, power point or other materials be considered to be, or used as independent legal, tax, investment or other professional advice. The discussions are general in nature and not person specific. Please consult with your advisor(s) prior to making any decisions based on the materials provided herein. Laws vary by state and are subject to constant change. Economic developments could dramatically alter the illustrations or recommendations offered in the program or materials.

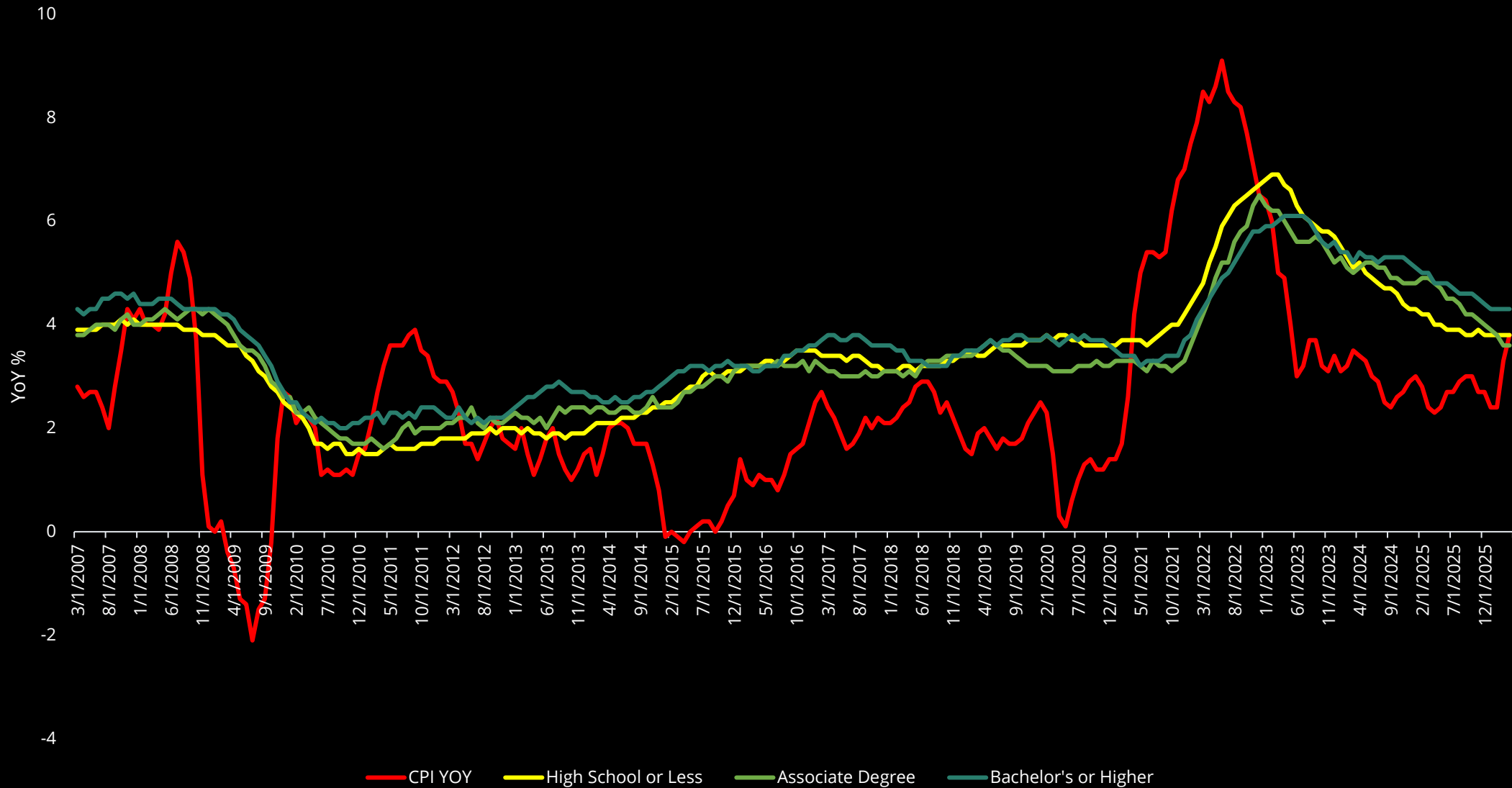




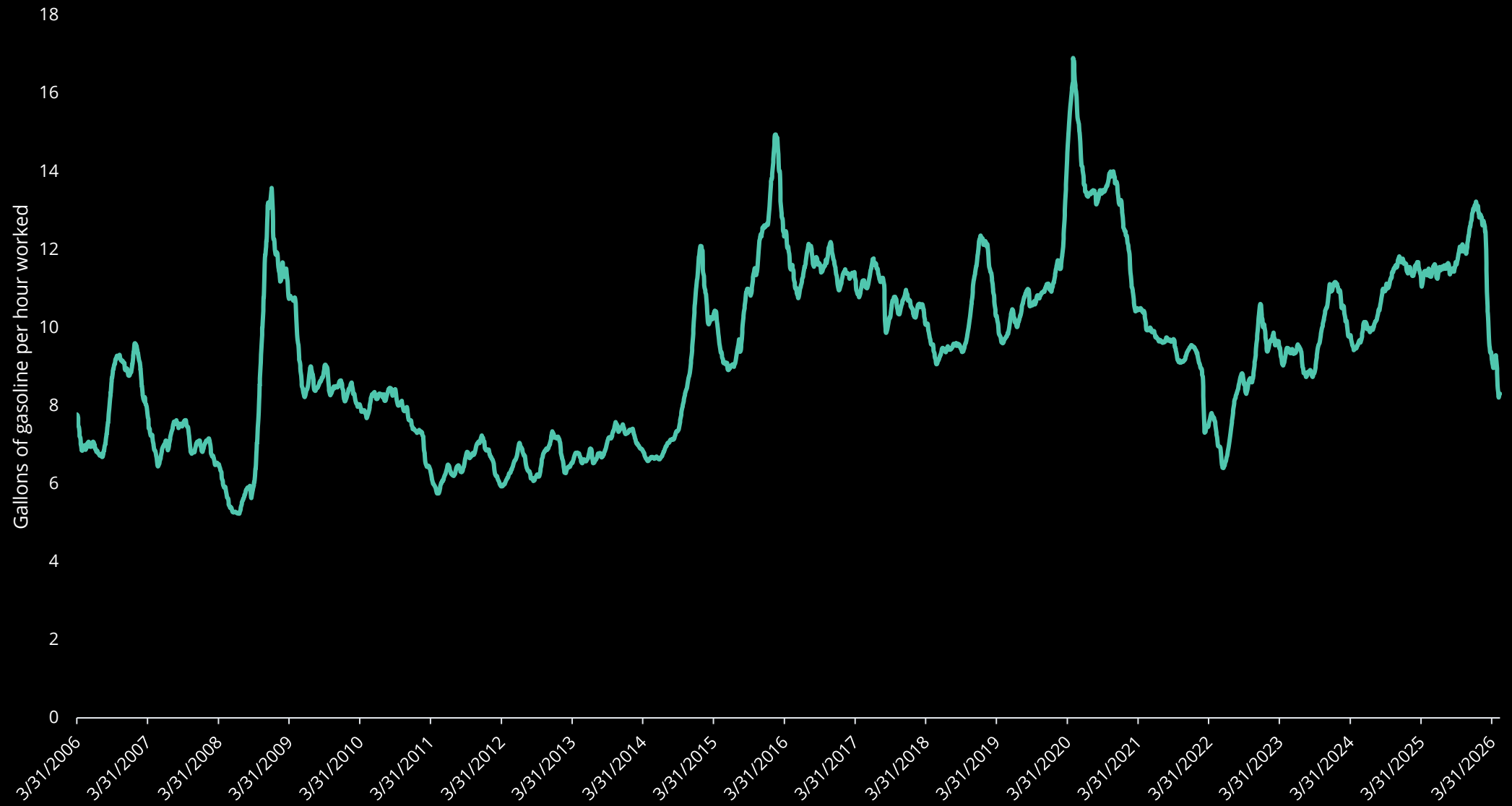
Source: Bloomberg quarterly data



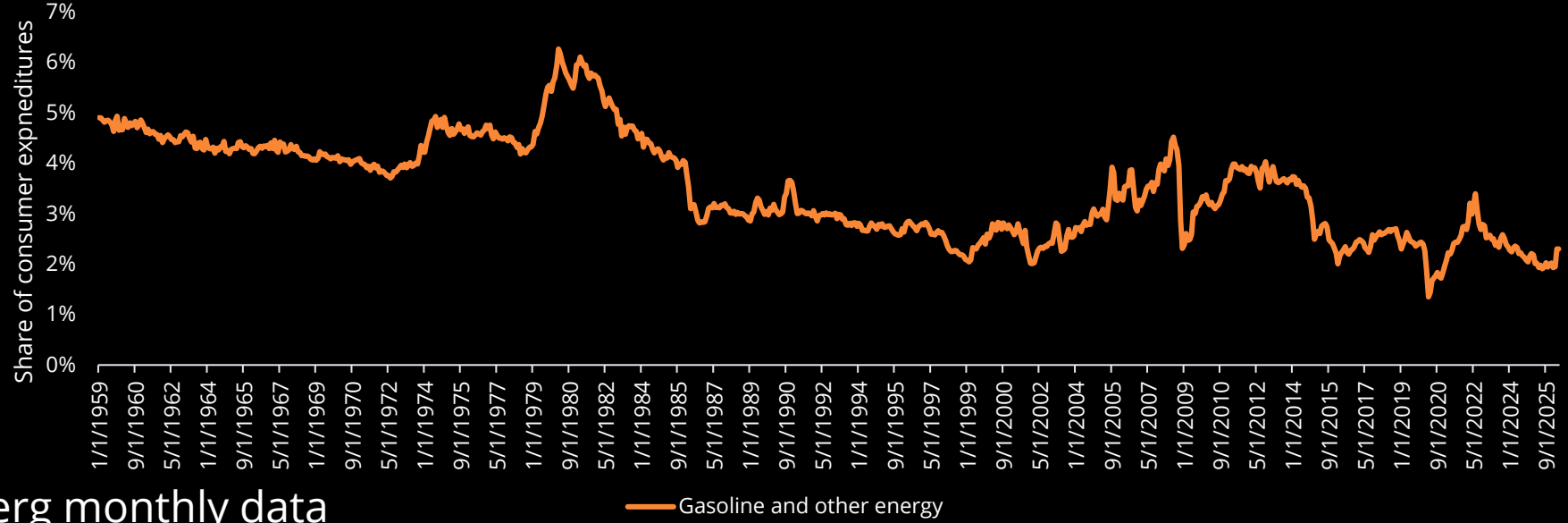
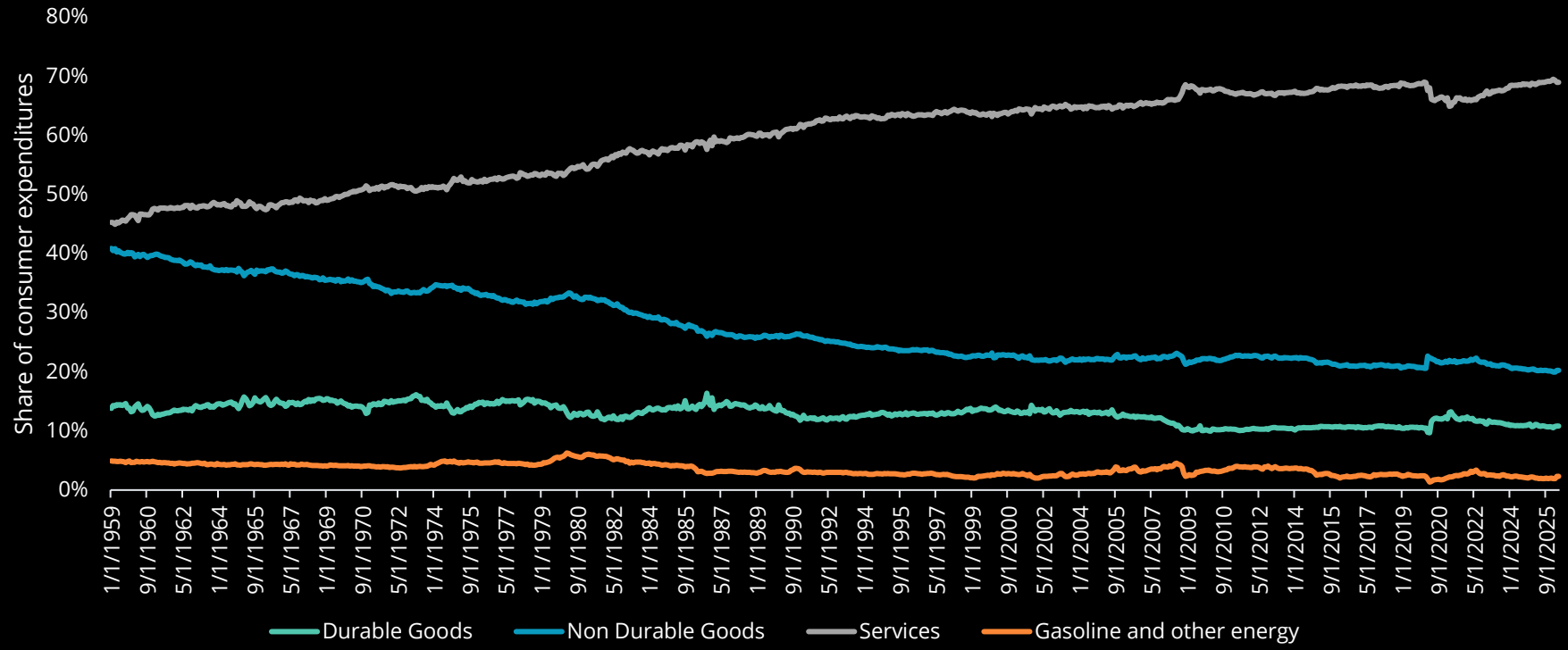
Source: Bloomberg monthly data



Source: Bloomberg monthly data



Source: Bloomberg daily data



Source: Bloomberg monthly data



Source: Bloomberg daily data

Make Sure You Know *The Difference.*



Know The Difference™

A Fee-Only Fiduciary **All Of The Time**

Comprehensive Wealth Management

In-House Expertise

Customized Planning

Your Money Held At An **Independent Custodian**

Simply-Stated, Transparent Fees

