



Objective: to help clients achieve long term savings and wealth accumulation goals

Designed For: 401(k), 403(b) and other employer-sponsored retirement accounts

Approach: we review your plan documents, research your investment options, and suggest an optimal investment portfolio based on your goals and comfort level with risk

About Laurentide

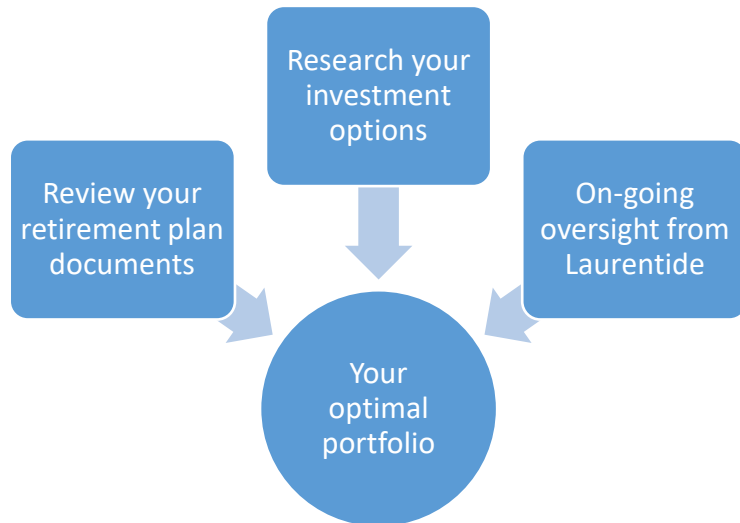
We believe every investor should have access to professionally managed investment strategies and comprehensive financial planning. Our mission is to elevate our clients' financial well-being through institutional-quality asset management, independent advice and personalized service.

Our Collaborative Process

The first step is to understand your perspective and needs:



Then, we use our investment expertise to recommend an optimal portfolio for you to select within the parameters of your plan:



Benefits of Working with Laurentide Advisory

- Fiduciary standard means **your needs come first**
- Our **independence** enables us to consider all options as we customize a portfolio for you
- Our research yields **best-in-class investments**
- **Active management** enhances returns & controls risk
- We are in direct partnership with you, supported by a **fee-only relationship**

Next Steps: Fill out our Risk Assessment Questionnaire and Client Profile form. We will provide a snapshot of your Laurentide customized portfolio.