SMITH
Wealth Management Group

GUIDING YOU TOWARD YOUR VISION OF THE FUTURE

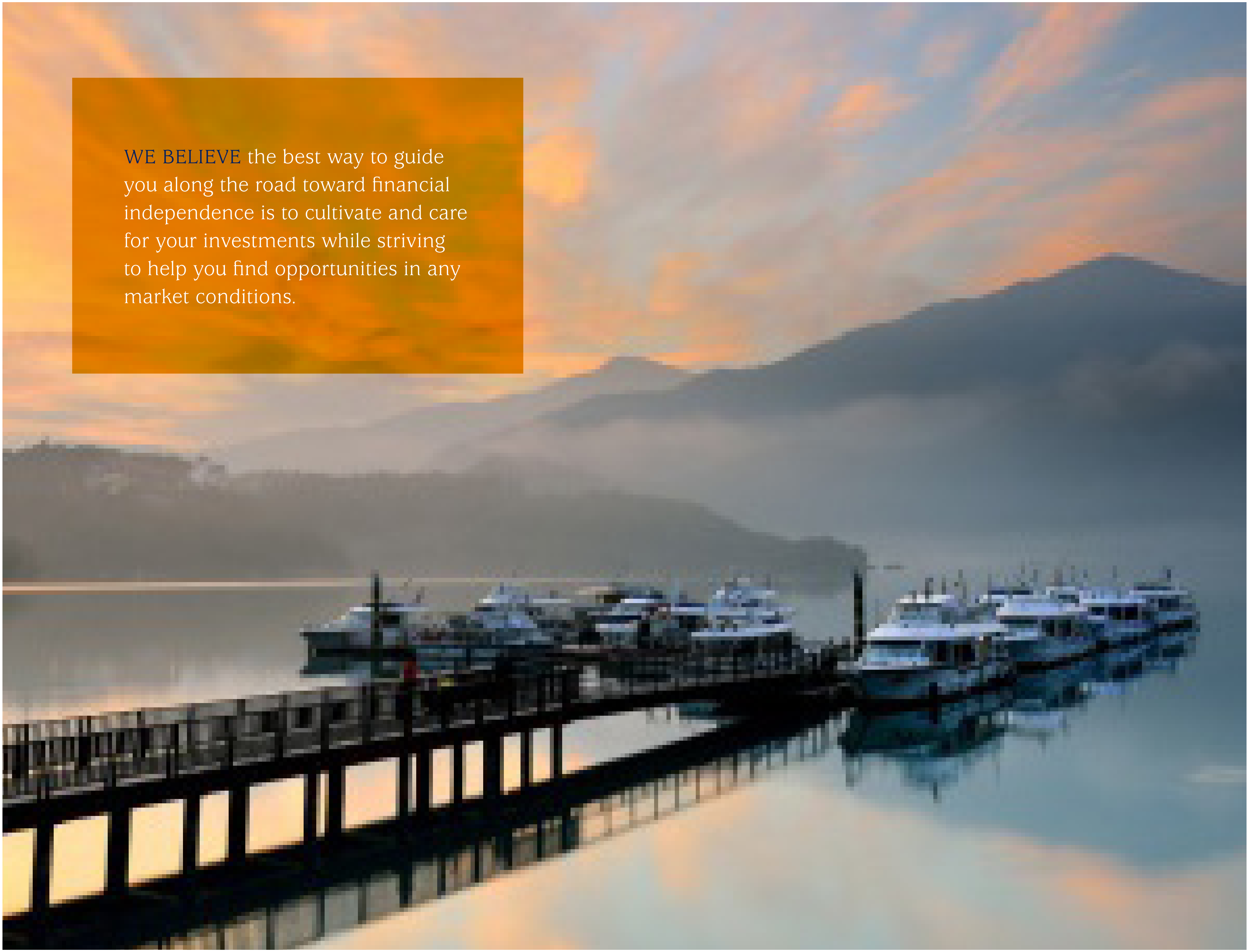
Your financial goals are unique, and they require a comprehensive, individualized strategy to address them.

Navigating the complex challenges of investment and retirement planning can be overwhelming. If you are looking for clear direction, you can trust Smith Wealth Management Group to help you gain confidence in your financial future. We are proud to offer our unbiased guidance, which allows us to put your best interests first, without compromise.

Our thoughtful approach enables us to deliver customized plans tailored to your specific objectives. You can count on us to exceed your expectations with thoughtful financial insights and honest communication—the elements we consider essential for building lasting relationships. We welcome the opportunity to help you pursue the life you envision.

OUR MISSION is to help our clients pursue financial freedom through comprehensive financial planning and disciplined asset management. To fulfill this mission, we aspire to provide unsurpassed levels of client service and the highest standards of professional ethics and integrity.

WE BELIEVE the best way to guide you along the road toward financial independence is to cultivate and care for your investments while striving to help you find opportunities in any market conditions.



COMPREHENSIVE INVESTMENT AND FINANCIAL PLANNING SERVICES

We offer the following personalized services to address your specific financial needs and help to preserve and build your wealth:

Fee-Based Financial Planning*: Retirement income planning, education planning, and tax and estate planning are components of a larger, more comprehensive plan designed to help you work toward multiple financial and lifestyle goals. Your plan also provides for your heirs and defines the legacy you choose to leave.

Education Planning: We structure a strategy that helps address education funding needs within your family and is compatible with your other financial objectives.

Investment Management: We are committed to helping clients pursue their financial objectives by using a variety of disciplined techniques for security selection and portfolio construction. Your diversified investment portfolio is designed for flexibility, and we closely monitor its performance, rebalancing or reallocating funds when necessary.

Retirement Planning: Whether you are in the accumulation phase or have already retired, a sound strategy is crucial to helping you retire on your terms.

As an independent firm, Smith Wealth Management Group provides unbiased financial planning and investment advice based on a thorough understanding of your unique circumstances and philosophy regarding your wealth. We offer the benefit of our more than 45 years of combined financial industry experience, education and professional training to help you pursue your financial goals.

*Financial planning offered through LPL Financial.

TRUST. RESPECT. CARING.

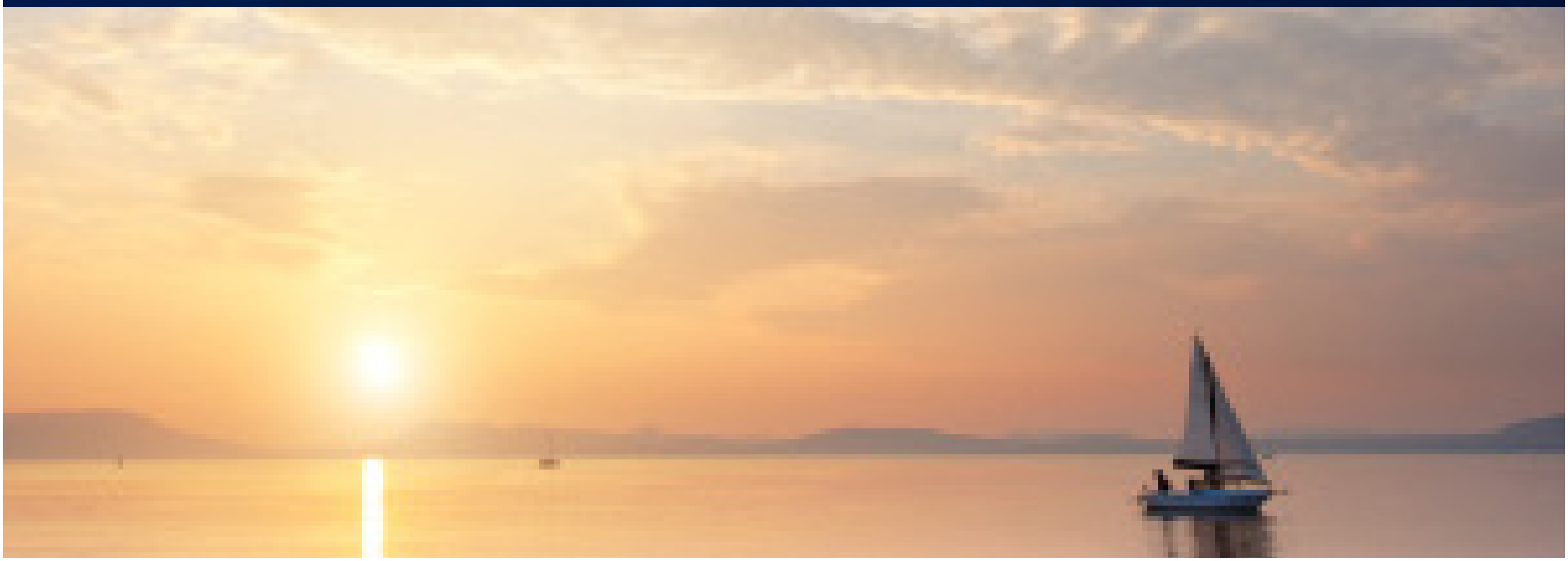
We strive to foster a culture of trust and respect whose primary objective is managing your wealth responsibly and creatively.

Your relationship with us begins with an initial discovery meeting and an introduction to our investing approach. At the heart of our process is an analytical assessment that reveals essential details about your financial needs and attitudes and enables us to recommend appropriate courses of action tailored to your life planning needs. By adhering to a holistic planning approach, we determine the best combination of risk and return for your investments.

Because life planning is a process, not a singular event, we communicate with you regularly to respond to any challenges or changes to your priorities or circumstances. We also help you take advantage of opportunities as the markets fluctuate or your financial needs evolve. And we are always available by phone or email to help with your simplest questions or your hardest decisions. Our goal is to be your trusted financial resource through all seasons of your life.

The WealthVision℠ advantage

The WealthVision℠ platform, a Web-based financial planning tool, integrates financial planning and wealth management, which can help make managing your financial life easier. WealthVision technology, combined with our planning process, allows us to pursue the right balance between addressing your specific issues and keeping the big picture in sight.



INDEPENDENCE POWERED BY LPL FINANCIAL

Smith Wealth Management Group is supported by the resources of LPL Financial, the nation's largest independent broker/dealer.* This relationship provides us with unbiased research and a comprehensive array of tools, resources and technology. Because LPL Financial has no proprietary products to sell, we have the freedom to offer you objective financial guidance and investment recommendations.

*As reported by Financial Planning magazine, June 1996–2013, based on total revenue.

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The independent professionals at Smith Wealth Management Group always put your interests first. We welcome the opportunity to speak with you about your financial goals and how we can help you pursue them. Please contact us to schedule a no-obligation consultation and discover the value of our experience, unbiased advice and personal service.

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