WEALTH MANAGEMENT SERVICES

THE
PARR McKNIGHT
WEALTH MANAGEMENT GROUP

CLARITY. CONFIDENCE. STRUCTURE.

333 South Seventh Street, Suite 2370 | Mpls, MN 55402
612-324-0240 www.parrmcknightwmg.com

1. FAMILY FINANCIAL OVERVIEW AND DEVELOPING YOUR PLAN

- Clarify Family Values, Goals and Objectives
- Assemble Consolidated Financial Statements
- Identify and Triage Financial Priorities
- Implement eMoney Plan

2. WEALTH AND INVESTMENT MANAGEMENT

- Customized Portfolio Solutions
- Alternative Income Strategies
- Indexed and Tax-Managed Solutions
- Individual Equity Strategies

3. PERSONAL BANKING / LIABILITY MANAGEMENT

- Liability Analysis and Optimization
- Through Wells Fargo Affiliates, You Have Access to Banking Services, Including: Securities-Based Lending and Residential Mortgages

4. CORPORATE BENEFITS AND RETIREMENT PLANS

- Managing and Understanding Corporate Benefits
- Optimizing Savings Plans and Pension Elections
- Annual Enrollment Support
- Cash Flow Modeling and Sensitivity Analysis

5. CONCIERGE (VIP) EXECUTIVE SERVICES

- Concentrated Equity Strategies
- 10b5-1 Trading Plans
- Stock Option and RSU Analysis
- IOU Stock Analysis

6. RETIREMENT INCOME PLANNING

- Design Tax Efficient Streams of Income
- Incorporate Lifecycle Spending Strategies
- RMD, Social Security and Medicare Planning Strategies
- Forecast/Develop Spending Plan

7. INSURANCE AND ASSET PROTECTION

- Insurance Advice: Life and Disability
- Needs Analysis and Policy Reviews
- Life and Disability Insurance
- Extended Care Planning

8. LEGACY PLANNING AND PHILANTHROPY

- Estate and Wealth Transfer Strategies
- Family Gifting Strategies
- Philanthropic Giving
- Trust Services

9. ADVANCED PLANNING

- Next Gen Counseling and Planning
- Educational Funding and Planning
- Intergenerational Family Meetings
- Business Succession Planning

10. COORDINATION WITH CPA AND ATTORNEY

- Tax Control Strategies
- Collaborative Meetings / Open Communication
- Professional Introductions
- Estate Documents and Tax Return Reviews

Please see Important Disclosures on the next page.

CLIENT'S PRICING GUIDE

ADVISED ASSET LEVEL	
$1 - $500,000.00	1.50%
$500,000.00 - $1,000,000.00	1.25%
$1,000,000.00 - $5,000,000.00	0.90%
$5,000,000.00 - $10,000,000.00	0.85%
$10,000,000.00 - $20,000,000.00	0.80%
$20,000,000.00 - $30,000,000.00	0.75%
$30,000,000.00 - $50,000,000.00	0.50%
$50,000,000.00 - $75,000,000.00	0.40%
$75,000,000.00 - $100,000,000.00	0.35%

IMPORTANT DISCLOSURES

There is a minimum fee to maintain this type of account. Advisory accounts are not designed for excessively traded or inactive accounts, and may not be appropriate for all investors. During periods of lower trading activity, your costs might be lower if our compensation was based on commissions. Minimum account sizes will apply.

There are additional costs associated with certain products & strategies such as private account managers, mutual funds or exchange traded funds.

The Parr McKnight Wealth Management Group, LLC ("PMWMG") is a federally registered investment advisor under the Investment Advisers Act of 1940. Registration as an investment advisor does not imply a certain level of skill or training. The communications of an advisor provide you with information about which you determine to hire or retain an advisor. Information about PMWMG can be found by visiting the SEC site www.adviserinfo.sec.gov. and searching by our firm name.

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