

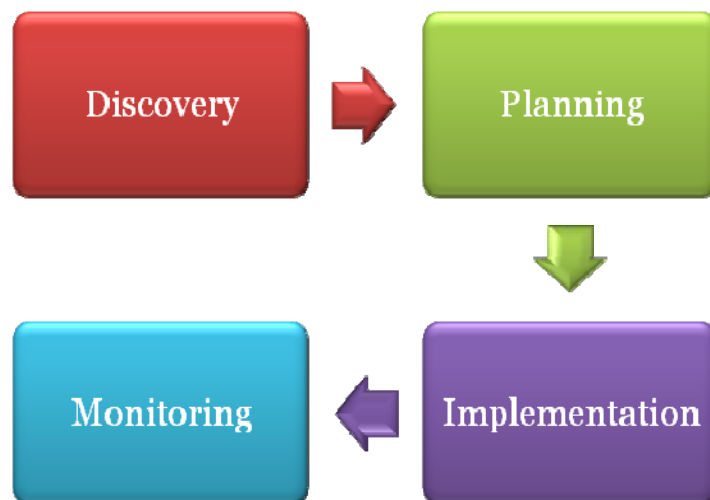


YOUR LIFE AWAITS .

PLAN WITH CONFIDENCE.

YOUR LIFE AWAITS. PLAN WITH CONFIDENCE.

This sums up our purpose in working with you. We offer a clearly defined wealth management process to help you achieve your life goals.



DISCOVERY

The discovery process helps you clarify your financial and nonfinancial goals. It establishes the groundwork for continued dialogue between you and us regarding your dreams and aspirations amid life's changes.

PLANNING

Our role is to develop a short- and long-range strategy that offers you an authentic chance to reach your goals. To accomplish this, we draw on the expertise of professionals such as estate planning attorneys, life and health care insurance specialists, and tax planning professionals.

IMPLEMENTATION

Implementing the plan is essential to your financial success. We offer a straightforward, uncomplicated approach to put the plan into action.

MONITORING

Creating a lifetime investment plan is not a one-time event. It involves an ongoing professional relationship that allows you to maintain a disciplined investment strategy amid life changes and volatile markets.

INVEST WISELY TO ACHIEVE YOUR LIFE GOALS



Soundmark focuses on these controllable factors to bridge the gap between where you are now and where you ultimately want to be.

LET'S BE BLUNT

We don't waste your money doing something that is counterproductive to building long-term wealth. Trying to find the top performing stocks or mutual funds and knowing when to buy and sell them is a losing strategy. It might work for a week, a month, or a year, but over a lifetime of investing, you are virtually doomed to underperform the market. That is why we embrace the simple and sophisticated concept of investing in low-cost, tax-efficient, passively managed (index) funds. But we don't stop there. Because risk and return are inherently related in capital markets around the world, we take this philosophy to a whole new level by introducing you to various risk factors of common stocks and bonds. Through our research and due diligence, we provide you with the best building blocks to assemble portfolios and capture the returns of these asset classes within markets around the world.

THE SOUNDMARK DIFFERENCE

- Boutique structure provides customized solutions, frequent communication, and the ability to accommodate your service needs.
- Independent, fee-only Registered Investment Advisor. As a fiduciary, this means our client's best interests always come first.
- Comprehensive wealth management utilizing a select network of estate attorneys, insurance professionals, tax accountants, and other advisors.
- Passively managed (index) funds and high quality fixed income products form the core of our long-term investment philosophy.
- A broad range of experience includes Certified Financial Planners®, CPAs, and a nationally acclaimed author.
- Access to Dimensional Fund Advisors (DFA), an institutional fund manager, available to investors through select advisors.

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