



**BARTOLF WEALTH
ADVISORS, INC.**

At Bartolf Wealth Advisors, we take great pride in our extraordinary client service and relationships- As an independent, registered investment advisory firm, we provide investors with objective personalized financial

Growing

Managing

Protecting Your Family's Assets

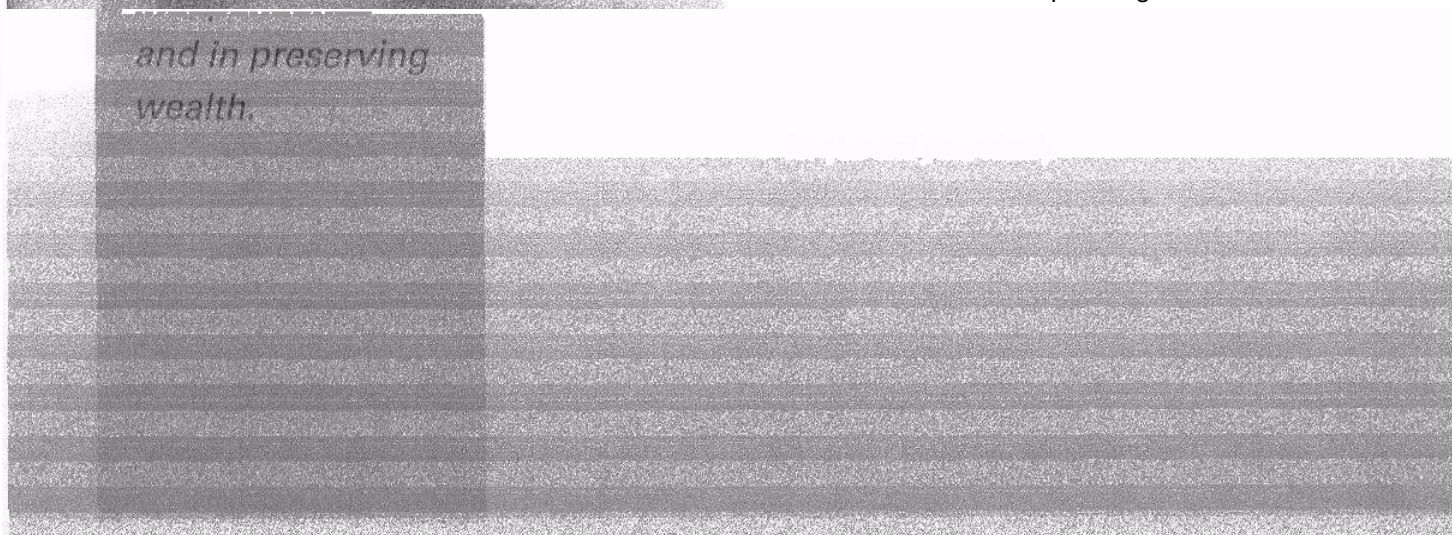
advice and wealth management. We work primarily with families, pre-retirees, retirees and surviving spouses concentrating on all the financial aspects important to those clients, including:

"There is a time when the most important investment you can make is to plan for your family's financial future. With the right financial advisor, the best time is right now."

Doug Bartolf, President, Bartolf Wealth Advisors

- Strategic wealth management
- Fixed income
- Cash management
- Long-term investment planning
- Estate tax reduction or elimination
- Income tax reduction, elimination and planning
- Retirement planning
- Elder care planning
- Education planning

*and in preserving
wealth.*



One of our unique offerings is that we partner with your other professional advisors, achieving the highest level of teamwork for the very best financial results possible for you and your family.

If you are looking for one advisor to handle all of your financial and investment concerns, schedule a free consultation now to see how we can add value to financial wealth-building and investment management for you and your family.

Bartolf Wealth Advisors, which offers fee-based services, serves clients across the country and we are always available to come to you.

INVESTMENT MANAGEMENT SERVICE

We can provide the discipline needed to help achieve long-term investment success. BWA will design and manage a portfolio specifically tailored to address your risk tolerance, time horizon, and goals. A minimum investment of \$250,000 is required in order to establish a relationship with our firm.

Reducing risk through diversification and constant monitoring of asset allocation is the centerpiece of our investment philosophy. With no affiliation or obligation to any parent company, we ensure our clientele objectivity. Our investment solutions are structured around your needs not proprietary offerings-

As part of our service, we offer a comprehensive financial plan as we work through choosing a suitable allocation of assets to meet your investment needs. Each year we will revisit the allocation and make necessary revisions and updates that reflect the changes in your personal life, the economy and current laws. Charles Schwab & Co., inc. is the primary custodian for our clients' investment accounts.

Bartolf has been in the financial services business for more than 20 years. As the president and principal of BWA, his experience ranges from operations to trust and estate administration to investment advisory services. A Certified Trust and Financial Advisor, he holds Series 7, 63 and 65 securities licenses.



Prior to establishing Bartolf Wealth Advisors, Doug worked for JP Morgan, formerly Baric One Private Client Services, for 8 years and Chemical Bank for 10 years. He has spoken frequently on investment related topics and co-hosted a local financial call-in radio show. He taught as an adjunct finance professor at Northwood University and serves as Chairman of his Church's Endowment Fund,

FINANCIAL PLANNING SERVICE

BWA can provide advice and guidance for many areas of your financial life - from retirement and college planning, to estate planning, insurance, business planning, and taxation. Available online, on paper, by phone, and in person, our advice is accessible to all and unique to each investor's goals and financial circumstances.

We encourage our clients to call us when they have a major life event such as a new job, addition to the family, a marriage, or divorce, buying a new home, and so forth. We also encourage our clients to call us with the everyday questions as well, such as How should I invest my 401 k? How can I reduce my taxes? Should I refinance my home? What should I do with my stock options at work?

PROFESSIONAL NETWORK

At BWA, we recognize that no financial planning firm can be an expert in every field. So we have formed strategic partnerships with accountants, estate attorneys, mortgage brokers, and insurance specialists to ensure top quality expertise, in servicing our clients' complete financial situations. The involvement of our partners will vary, and may be as simple as providing an answer to a question, or as complex as playing an integral role in a comprehensive plan.



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