

Digital Wealth

- High net worth individuals
- Pension plans/profit sharing plans
- Pension consulting
- Foundations/charities
- Private funds or pools
- Selection of Other Advisers/Solicitors

DIGITALWEALTH COMPANY

DIGITALWEALTH COMPANY ("DIGITALWEALTH" OR THE "FIRM") IS A CLOUD-BASED DIGITAL-ASSET INVESTMENT MANAGEMENT FIRM FOUNDED IN 2021. DIGITALWEALTH PROVIDES CUSTOMIZED DIGITAL-ASSETS INVESTMENT MANAGEMENT SERVICES TO INDIVIDUALS, HIGH NET WORTH CLIENTS, TRUSTS, ESTATES, SMALL BUSINESSES, CHARITABLE ORGANIZATIONS, AND PENSION/PROFIT SHARING PLANS.

TYPES OF DIGITAL-ASSETS

CRYPTO-BASED:

- * DEFI AND DEFI LENDING
- * STABLECOINS
- * ETFS
- * CUSTODY
- * TRADING VENUES
- * INITIAL COIN OFFERING

TYPES OF ADVISORY SERVICES:

DIGITALWEALTH PRIMARILY PROVIDES TWO TYPES OF ADVISORY SERVICES: DIGITAL FINANCIAL PLANNING SERVICES AND DIGITAL INVESTMENT MANAGEMENT SERVICES. THE COMBINATION OF THESE SERVICES IS CALLED DIGITAL WEALTH MANAGEMENT SERVICES. THE FIRM OCCASIONALLY PROVIDES "OTHER CONSULTING" SERVICES ON A CASE BY CASE BASIS.

1. FINANCIAL PLANNING SERVICES

FINANCIAL PLANNING SERVICES INCLUDE THE INITIAL DIGITAL WRITING AND DIGITAL FORMULATION OF A PERSONAL FINANCIAL PLAN, WITH RECOMMENDATIONS AND SUPPORTING WRITTEN WORK AS NECESSARY, AND MAY INCLUDE THE ONGOING TRACKING OF THE CLIENT'S PROGRESS IN ACHIEVING THE PERSONAL FINANCIAL GOALS TARGETED IN THE PLAN. THE SCOPE OF FINANCIAL PLANNING SERVICES SELECTED IS DEFINED IN ADVANCE AND AGREED UPON BETWEEN THE FIRM AND THE CLIENT. FEES FOR FINANCIAL PLANNING SERVICES ARE DEFINED UNDER ITEM A: FEES AND COMPENSATION.

2. DIGITAL INVESTMENT MANAGEMENT SERVICES

DIGITALWEALTH OFFERS CLIENTS DIGITAL INVESTMENT MANAGEMENT SERVICES THAT ENCOMPASS DIGITAL-ASSET AND ALTERNATIVE ASSET CLASSES. THE FIRM WILL GENERALLY MANAGE A CLIENT'S INVESTMENT PORTFOLIO ON A DISCRETIONARY BASIS, AND MAY ASSIST THE CLIENT IN THE ESTABLISHMENT OF THE NECESSARY CUSTODIAL ACCOUNT(S).