NEW AGE WEALTH

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*Story of*

# OUR FIRM

**“What I’ve learned is that we cannot play by the rules of a game that wasn’t designed for us to WIN.  New Age Wealth is here to make a change to an old industry."**

*- Founder, Curtis J. Williams*

*New Age Wealth Co was founded to help individuals and businesses create wealth now, and legacy forever.*

# Full-Service

**TO MEET YOUR CURRENT AND FUTURE NEEDS**

- Retirement Plans
- 401(k)s, 403(B)s, 457 Plans
- College Planning
- IRA & ROTH IRA
- Investment Advisory Services
- Charitable Strategies
- Executive Bonus
- Buy-Sell Arrangements
- Pension and Annuities
- Deferred Compensation
- Financial Goal Setting
- Mutual Funds, Exchange Traded Funds
- Insurance
- Estate Planning
- Wills, Trusts
- Profit Sharing Plans
- SEP and Simple IRA
- Split Dollar
- Business Investment Arrangements
- Long Term Care

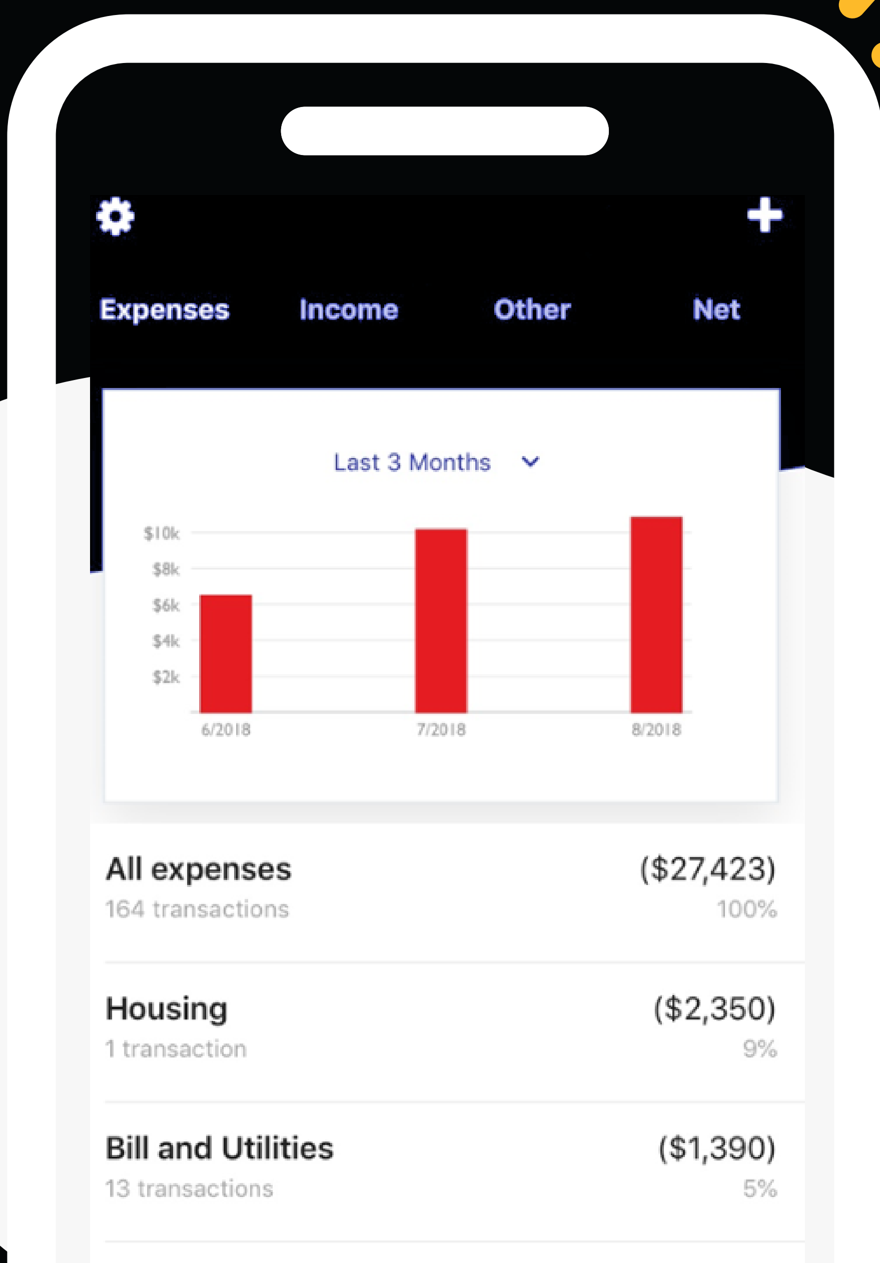
# OUR STRATEGIES, YOUR WEALTH

## 6 AREAS OF FOCUS

| | | |
|---|---|---|
| Cash Flow | Debt Management | Emergency Fund |
| Risk Management | Asset Accumulation | Legacy |

# CLIENT PORTAL

YOUR FINANCIAL PICTURE
ACCESSIBLE 24/7



*ALLOW US TO BE YOUR*

# FINANCIAL PARTNER

## YOUR PERSONAL + BUSINESS FINANCIAL STRATEGIES

### Ongoing Holistic Financial Planning
Planning for the overall picture of - YOU + YOUR BUSINESS

### Strategic Planning, Education and aided Implementation
Don't sweat all the jargon and moving parts. We'll guide you with what you need to know, need to do, while we help implement.

### Financial Portal Access
Monitor the success of our plans 24/7

### Answer Your Questions
You now have a team of professionals to guide you

## Recommended Investment

**OPTION #1**

1. **Custom full holistic planning for Personal and/or Business needs**

**OPTION #2**

2. **A La Carte based on needs**

***Pricing will vary**

*ALLOW US TO BE YOUR*

# FINANCIAL PARTNER

## ONE

### DISCOVERY SESSION

***Let's talk goals, fears, and numbers.***

## TWO

### RECCOMMENDATIONS

***Discuss and Review personal recommendations + Curated Education & Implementation Plan***

## THREE

### PLAN OF ACTION

***Prepare and implement plan of action***

## FOUR

### EDUCATION SESSIONS + PORTAL WALK THROUGH

***Education session roll out + in-depth review of financial planning portal***

## FIVE

### REVIEWS

***Staying on top is a must! Six (6) additional review sessions yearly outside of implementation or scheduled review sessions.***