



Cost of WealthPoint Services

The following costs are charged by WealthPoint Advisors, LLC for wealth management services provided:

Account Balance	Annual Fee
Up to \$999,999	1.00%
\$1,000,000 to \$2,999,999	0.90%
\$3,000,000 to \$6,999,999	0.75%
\$7,000,000 to \$9,999,999	0.60%
\$10,000,000 to \$19,999,999	0.50%
\$20,000,000 and above	Negotiable

This cost is billed directly to you or deducted from the investment accounts under advisement and is subject to an annual minimum cost of \$2,500 per family. See our Investment Advisory Agreement for more details.

Why we and our long-term clients believe value exceeds costs:

Our clients come to us for a variety of reasons and stay because of the value they find. The following table outlines what we do for clients and how it is so much more than investment management:

Expertise	Counseling	Convenience	Legacy Planning
Financial Planning	Education on market & investing	Free up your time to focus on what's really important	Spouse involvement
Investment Selection	Manage emotions & stress	To coordinate with other professionals	Multi-generational & legacy planning
Asset Allocation	Avoid costly behavioral mistakes	Personalized service	Children immersion
Retirement Planning	Peace of mind	Investment monitoring	Charitable Planning
Multi-year tax planning	Trusted second opinion	Rebalance portfolio	
Estate Planning			



Securing Tomorrow, Today.

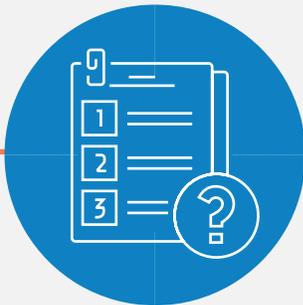
We know that we can't promise what your future will hold. But we can promise that our team at WealthPoint Advisors will work hard to secure your tomorrow, today. The financial industry charges big fees for little service. We're here to turn that around. We aren't associated with any banks, insurance companies, or brokerage firms, so we can offer our clients solid, research-based advice backed by our years of industry experience.

To determine if we are a good fit, call for a complimentary Discovery Meeting to learn more about how we can help you and your family.



DISCOVERY SESSION & GOALS

1. First, during our initial Discovery Meeting, we learn as much about you both qualitatively and quantitatively as we can. We seek to understand your unique situation and your dreams for the future.



INVESTMENT PLANNING & REVIEW

2. Next, during our Investment Plan Meeting, after we know where you want to go, we illustrate strategies that we believe will help improve your situation and build a path toward a better future.



WEALTHPOINT REVIEW

3. Finally, at our Mutual Commitment Meeting, we decide if working together would be mutually beneficial. We are not right for everyone, nor is everyone right for us.