

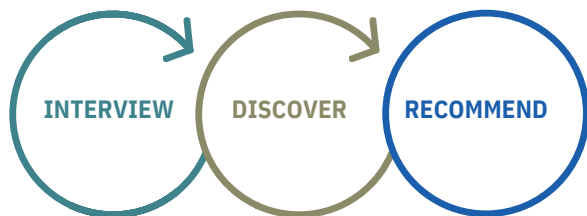
# How we work with our clients

## WealthBasic

WealthBasic is our transactional planning solution designed to address specific needs. For example, you may need disability income insurance, life insurance, or want to roll over a retirement plan from a previous employer.

The WealthBasic process is simple. We'll meet with you for an in-depth interview, ask the right questions to determine which products are most suitable for you, and recommend a solution.

### WealthBasic Process



As you progress through life and your finances become more complex, we encourage you to consider our WealthElite services, which allow for a more comprehensive review of your situation.

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Estate planning services are provided in conjunction with your estate planning attorney, tax attorney, and/or CPA; consult them for specific tax/legal advice.

Securities and investment advisory services offered through qualified registered representatives of MML Investors Services, LLC. Member SIPC.

Supervisory Office: 4830 W Kennedy Blvd  
Suite 800, Tampa, FL 33609, (813) 286-2280.

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## WealthElite

WealthElite is our multidisciplinary financial planning process. WealthElite clients pay us to look at all areas of their finances.

We begin by discovering the financial goals that are most important to you and your family. We then evaluate the effectiveness of your present financial arrangements. After analyzing this information, we adjust your plan to help position you for future financial success.

Along the way, there will be plenty of opportunities for us to educate you, allowing you to make informed decisions and be an active participant in the process.



Upon delivery of the plan, many clients choose to implement solutions with us.

**Should you decide to retain us after your plan is delivered, as a WealthElite client you will enjoy the benefits of having a financial advocate at your service to monitor and maintain your plan year round.\***

\* May require an updated agreement and be subject to additional fee.

CRN202707-6913029

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