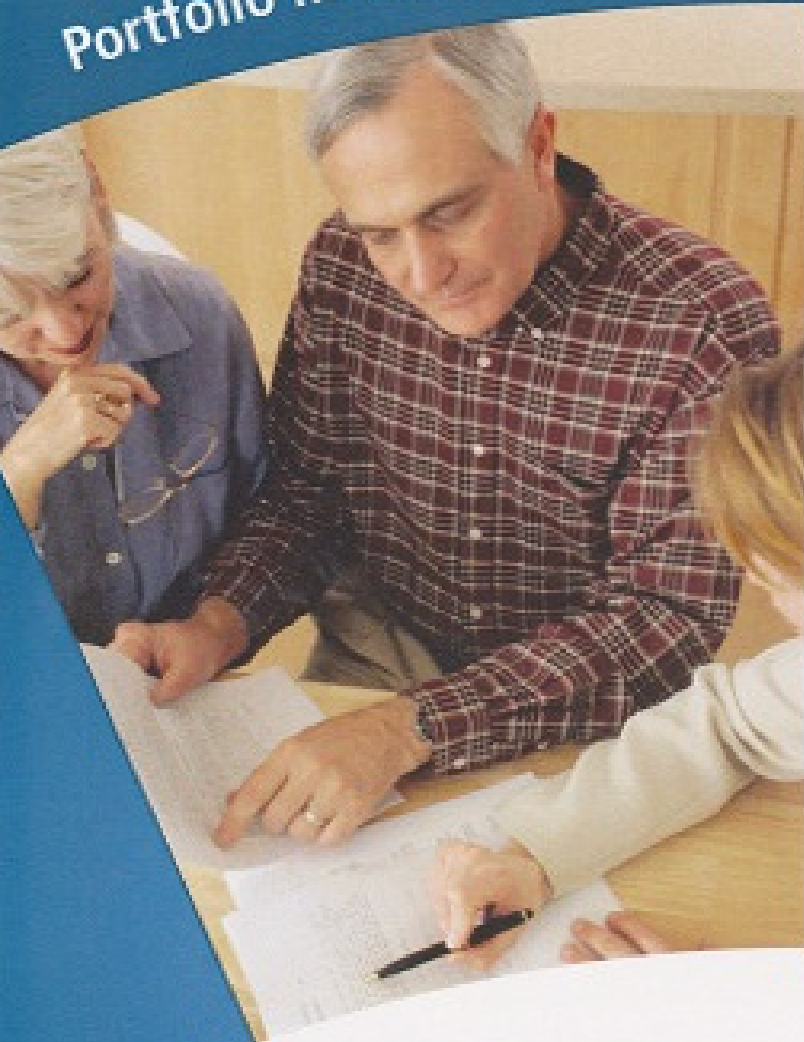


# Portfolio Management



Impeccable  
service.  
Confidentiality.  
Results.

Develop and optimize your portfolio with help from our Chartered Financial Analyst (CFA). We have retained Provisus Wealth Management, a nationally licensed portfolio management firm, to provide our clients with a professionally managed portfolio service.

Through an in-depth conversation about your financial goals, our CFAs can help you identify and buy the investments that are right for you, and manage/trade them as appropriate. It is their responsibility to achieve results for you

*It's part of my added service to you  
at no additional cost.*

through professional wealth enhancement and risk management strategies.

Benefits of your customized portfolio include:

- Tax deductible portfolio management fees on non-registered accounts
- Stocks and bonds electronically traded specifically for you, in your name
- 24/7 online viewing of your account and transactions