ViaForte

Wealth Strategy and Insurance Advisors

Committed to ensuring **YOUR** *legacy through strong insurance solutions.*

A LIVING LEGACY

You have worked hard and planned thoughtfully to accumulate your wealth. Now is the time to put that same focus on preserving and leveraging your accomplishments.

You want a customized strategy that incorporates components of the following:

- Protects you against risks and preserves your assets
- Safely transfers financial stability and strong values to the next generation
- Reduces estate and income taxes and provides for the administration of your affairs
- Furthers your values through philanthropic endeavors and charitable giving
- Ensures your **enduring legacy**

WISDOM & COUNSEL

You have goals. You see your destination. Ahead of you is your lasting legacy, one that protects your family and furthers your lifelong values.

But how will you get there? Which path will you choose? Whom do you trust to guide you?

Introducing

ViaForte:

Earning confidence through *experience* & *expertise*

WHO WE ARE

- Experienced insurance advisors and wealth managers offering unmatched expertise to high-net-worth individuals and families
- Committed practitioners of integrated wealth management strategies and techniques
- Advanced planning strategists who offer unique, sophisticated plan design
- Insurance advisors who serve as part of your expert financial services team

WHAT WE DO

- Tailor customized insurance solutions that address your unique needs
- Put your needs first and consider the big picture
- Apply experienced wealth management practices to your situation

WHY WE EXIST

- To help you create your enduring legacy
- To help you protect your family, preserve your assets, pass wealth to future generations and advance your core values

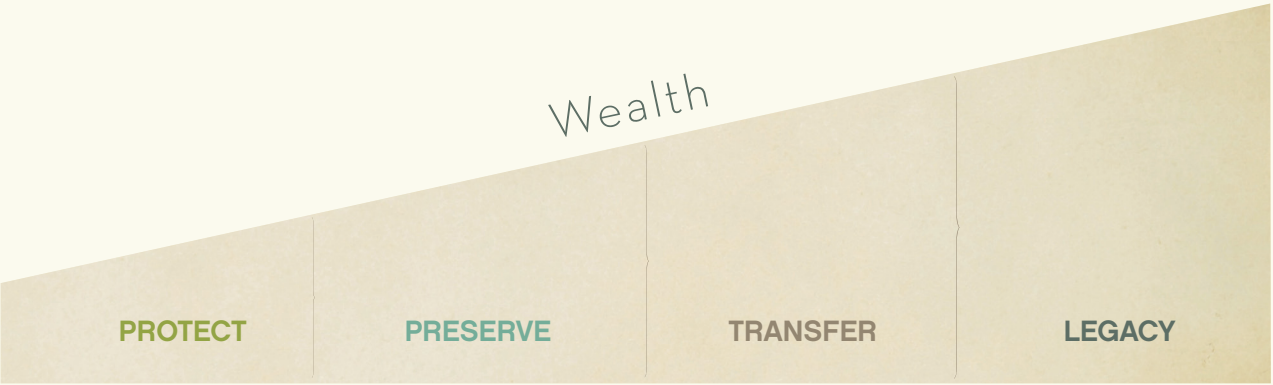
WHY CHOOSE VIAFORTE

We bring a unique perspective to our work, a perspective that allows us to identify solutions other advisors may miss. The reason? Our talented team is steeped in the wealth management profession. We view your financial situation holistically. We see the big picture and the sum of the parts. And that means our recommendations offer strategic alternatives that apply experience and expertise to get you the outcomes you desire. Ultimately our commitment is to maximize the transfer of your wealth—helping you to ensure your legacy for years to come.

ViaForte

YOUR WEALTH JOURNEY

You've built a solid foundation. You've grown your wealth. Now it's time to develop a strategy to transfer your wealth in the most effective way possible. The actions you take now will create and define your lasting legacy.



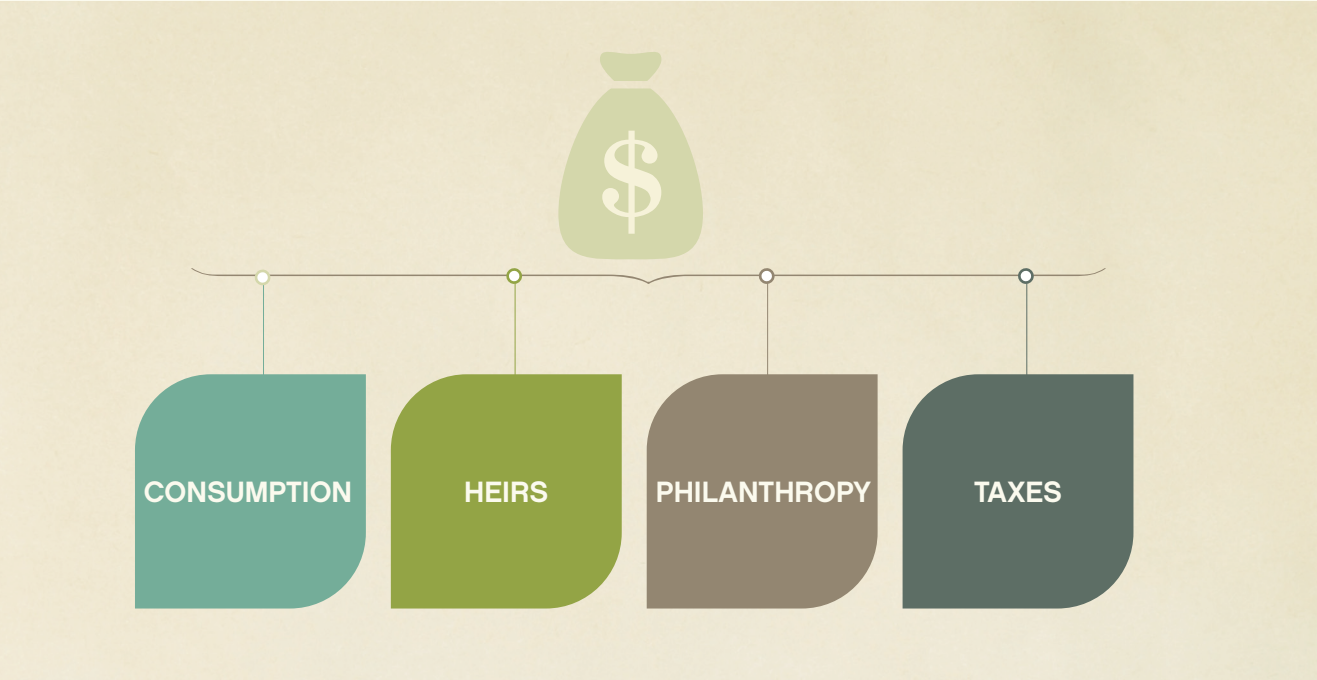
YOUR WEALTH OPPORTUNITY

From your position of strength, you gain access to greater opportunities—options not available to just anyone.

From our position of strength, we identify these opportunities and put them to work for you and your family.

WHERE WILL YOUR WEALTH GO?

Making smart choices and acting on wise counsel means you can direct more of your wealth to where you want it to go, now and well into the future.



CUSTOMIZED INSURANCE SOLUTIONS

Traditionally, insurance serves as a tool to protect against losses—but for those who are financially secure, insurance becomes an engine to create and leverage financial opportunities.

Your position puts you beyond the need to merely mitigate losses. Your financial resources open the door to creative planning strategies and advanced wealth-management tactics that can improve your outcomes and secure your legacy.

We consider your situation and highlight choices you didn't know you had. The solutions we craft for you are customized, not "off the shelf."

We work with you to identify tax-advantaged financial vehicles offered through insurance companies that create unique opportunities for high-net-worth individuals.

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OUR APPROACH — TRUSTED ADVISOR & TEAM PLAYER

We approach our work with a single-minded focus: Doing all we can to identify what is best for you and your family.

Everything we do reflects our heritage:

- Holistic, integrated wealth management
- Client-centric, consultative approach
- A history of stewardship
- A commitment to transparency

Our process is thorough, objective and personal. We design insurance solutions that fit your story and your goals.

We are team players who join your inner circle. We work with your existing advisors to help ensure that the whole is greater than the sum of its parts.

STRENGTH IN NUMBERS: M Financial Group™ **MEMBER**

We keep good company—for your benefit. ViaForte is a member of M Financial Group, a members-only consortium that includes some the nation's most successful and innovative financial services firms.

Our membership gives you access to advantages that we put to work for you:

- The collective strength of M member firms brings you access to proprietary products designed specifically for high-net-worth families and individuals
- Product features and flexible options made available exclusively to M members
- Specially negotiated platform with insurance carriers designed to deliver the highest possible performance along with competitive pricing reflecting the extraordinary mortality, persistency, premium volume, and high average face amounts of affluent clients
- Continuous monitoring of service, experience and performance of in-force business to ensure that products continue to be effective. As a result, pricing enhancements, supported by experience data, can be applied to both new policies as well as those already in-force

ViaForteadvisors.com

M Financial Group™

Member Firm

ViaForte

ABOUT OUR NAME

Via is the path, the way, the journey
Forte is strength, the foundation, depth, experience and trust
ViaForte shows the way to an ***enduring legacy***

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Securities offered through M Holdings Securities, Inc.,
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