PICKLER
WEALTH ADVISORS

GOLD LEVEL

Congratulations on your GOLD LEVEL status at Pickler Wealth Advisors (PWA). As a premier client, we welcome you to the PWA family and will proactively partner with you to create a customized plan and strategy centered on attaining your unique financial goals. At PWA, Gold Level clients receive the time, attention and proven financial insight and expertise they deserve to fully optimize their individual portfolios and achieve their dreams.

It is our great privilege to serve you, and for our Gold Level clients, it is *personal*: PWA President David A. Pickler acts as "Advisor on Alert" available "24/7", so please make use of PWA counsel at any time. Again, we congratulate you on your impressive Gold Level status at PWA.

ON THE RISE AT PWA

GOLD LEVEL BENEFITS

5 "Touch Points"
We offer 5 service areas that connect our Gold Clients to the very best of PWA.

A Personal Approach: As a valued member of the PWA family, we invite you to stylize our *360-degree service model* in ways that best meet your personal schedule, individual needs and specific financial goals.

Delivering on the Promise – Every Day: We take great pride in being named by *Financial Times** as one of the top 400 advisors in the world, and by *Barron's Magazine*** as one of America's top 1,000 advisors.

When it comes to your financial future, we're tenacious. Thank you for placing your trust and confidence in PWA. Please alert us if you wish to schedule an in-office appointment with David.

Premier Benefits for Gold Clients on Reverse Side

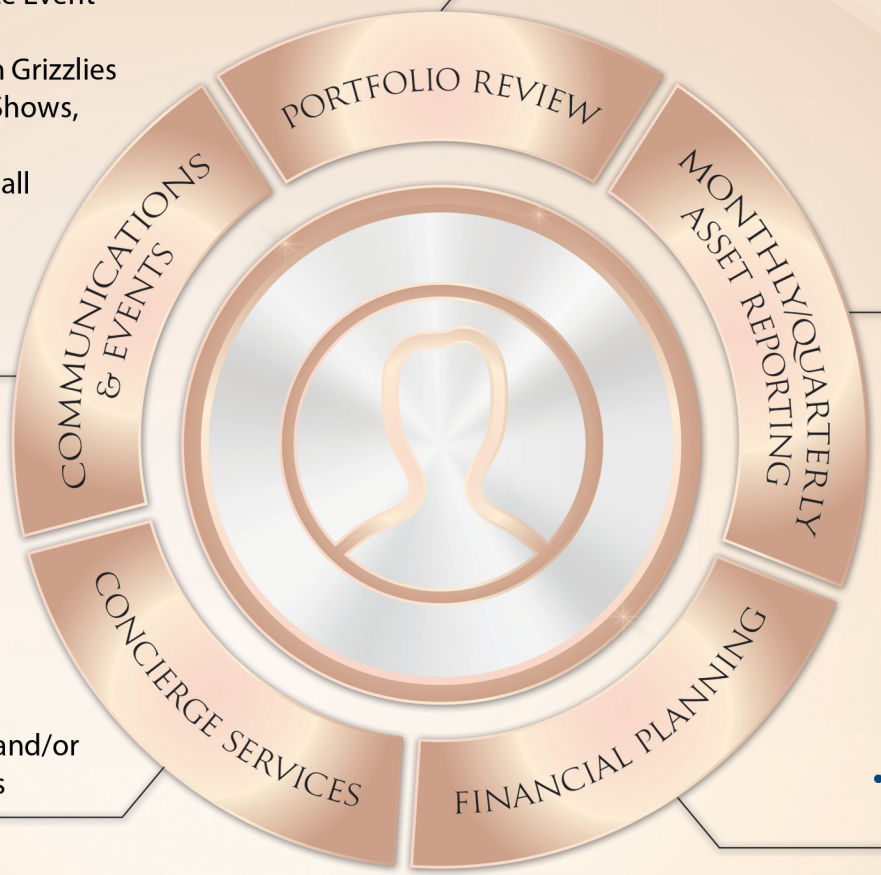
Securities and advisory services offered through Commonwealth Financial Network®, Member FINRA/SIPC, a Registered Investment Adviser.

GOLD CLIENT BENEFITS

As a Gold Level Client, you are entitled to membership in the exclusive **PWA Client Advisory Council**. Your membership on the Council carries these special benefits:

- Customized and Holistic
- Customized Frequency and Proactive Action Plan
- 2-3 Meetings Per Year
- Traditional Portfolio Review Document or Commonwealth Financial Network Consolidated Statement

- Market Letter and Holiday Letter
- "Market and a Movie" Update Event
- Holiday Open House
- Ticket Offers (First Choice on Grizzlies Games & Events, Orpheum Shows, and Redbirds Games)
- Bull Talk: Quarterly Market Call
- Investor 360 Online Access with Asset Aggregation
- ***Advisor on Alert*** - 24 Hour Access to David Pickler



- Tailored to Your Client Preference; Commonwealth Quarterly Portfolio Review by Email or Snail Mail

- Complimentary Estate Planning and Tax Consultation/Review
- Joint Meetings with Family and/or Other Professional Providers

- Holistic Financial Planning and Advanced Wealth Strategies

**The Financial Times 400 is based on each advisor's performance in six primary areas, including assets under management, asset growth, compliance record, experience, credentials, and accessibility. For the full methodology*, please visit http://www.money-media.com/ft400.html * Not indicative of advisor's future performance. Your experience may vary.*

***Based on assets under management (AUM), revenue, regulatory record, quality of practice and philanthropic work. Investment performance is not a criterion. AUM= total account assets and are managed through Commonwealth.*