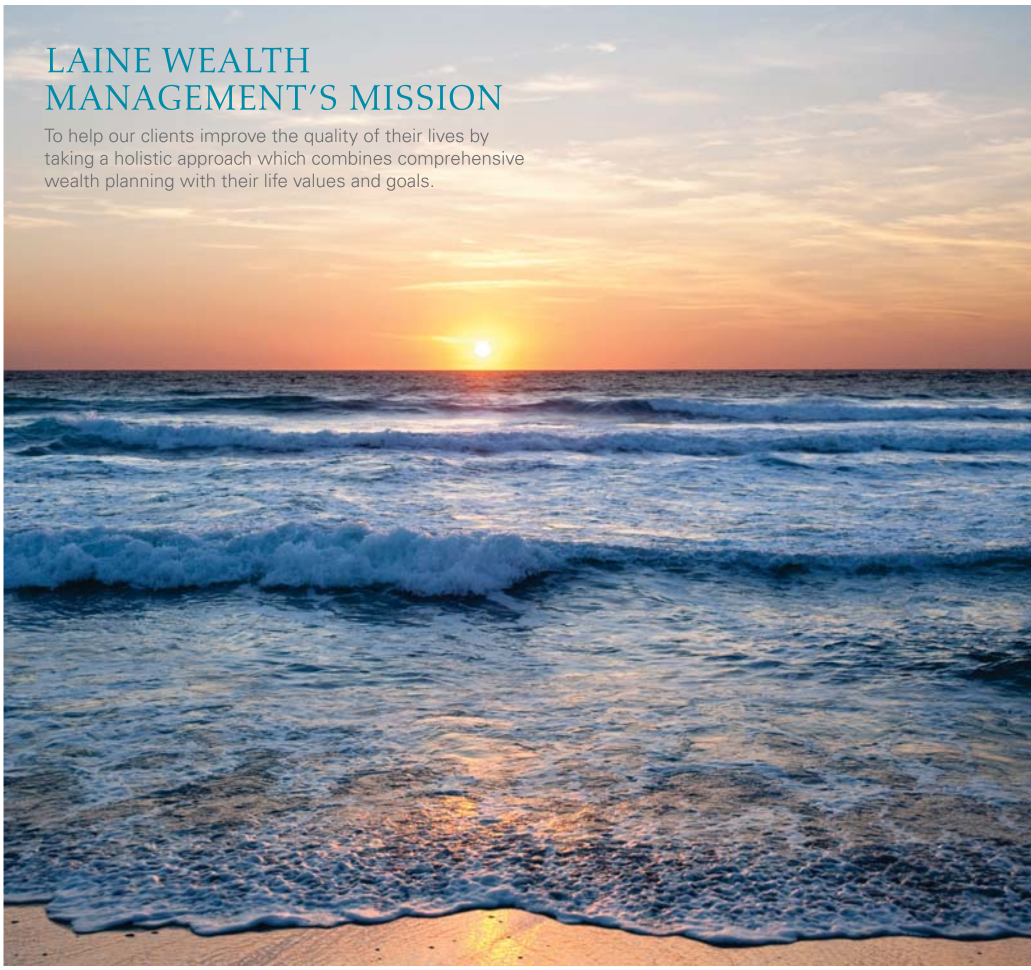
LAINE WEALTH MANAGEMENT

Independent, objective advice



LAINE WEALTH MANAGEMENT'S MISSION

To help our clients improve the quality of their lives by taking a holistic approach which combines comprehensive wealth planning with their life values and goals.

Our Wealth Management Process

Through prudent planning and investing, we can help you strive for financial independence on your terms. Our wealth management process provides in-depth insight regarding where you are now, where you want to be and how you will get there.

The First Question: What does living well mean to you?

One of the most important questions we ask our clients to take time to think about is, "What does living well mean to you?" While this may be a simple question, it is often difficult to answer.

As part of our wealth management services, we incorporate a discovery process to help you better understand what is really important in your life. "You may have the means, but do you have the meaning?"

Understanding what is most important to you helps us make confident decisions to help you and your loved ones pursue your definition of living well.

THE FULL PICTURE: YOUR FINANCIAL ROAD MAP

We believe all clients need a financial road map to help them navigate through all of the financial issues they may face throughout their life.

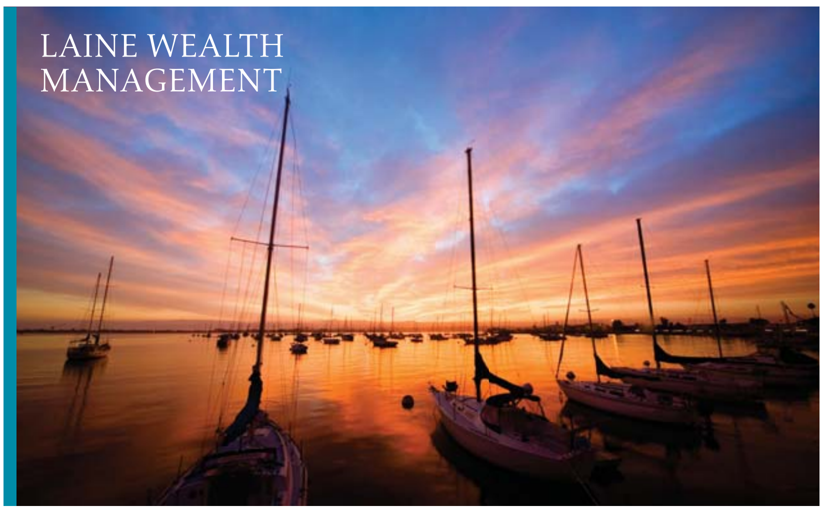
This typically includes some or all of the following:

- Goal setting
- Cash flow management
- Tax planning
- Retirement planning
- College funding
- Estate planning
- Risk management
- Charitable planning
- Family governance
- Legacy planning
- Money archetypes
- Retirement income planning

With our gained assurance on each of these areas, we can help you make well-informed decisions regarding your financial future.

Implementation and Monitoring

Once you are satisfied with the strategy we recommend, we implement that strategy and conduct periodic reviews to measure your progress against your goals, making revisions as the markets fluctuate and your needs evolve.



Unbiased Advice. Personal Service.

Since 1984, we have been providing strategic investment wealth management guidance to individuals, families and businesses who appreciate the great care we take to provide them with unbiased advice and personal service.

As an independent firm with no company agenda to promote, we have the freedom to work with a wide selection of money managers, insurance companies and other investment firms, allowing us to focus solely on what is best for you.

We also collaborate with other professionals—CPAs, estate attorneys and other advisors—should you need their specialization and expertise. Our role is to coordinate the activities of these professionals to help ensure that all your financial needs are being properly addressed.

Laine Wealth Management is powered by the resources of LPL Financial, the nation's largest independent broker/dealer.* This relationship provides us with unbiased research and a comprehensive array of tools, resources and technology. Because LPL Financial has no proprietary products to sell, we are able to make informed recommendations and provide you with conflict-free advice.

*As reported by *Financial Planning* magazine, June 1996–2012, based on total revenue.

Clients Bill of Rights

- Courteous service
- Trustworthy and competent financial advisors
- Suitable recommendations
- Full disclosure of costs and risks
- Clear communications
- Comprehensive statements and trade confirmations
- Prompt error and complaint resolution
- Strict confidentiality

If you could benefit from working with an experienced firm that places great emphasis on helping you live well, it would be our pleasure to offer you our personal service and unbiased guidance.

We invite you to learn more about our firm at www.lainewealthmanagment.com, or call 310.568.4516 to schedule a no-obligation consultation.

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126 Lomita Street | El Segundo, CA 90245
310-568-4516 phone | 310-568-2008 fax
www.lainewealthmanagement.com

Connect with us for current market updates and events.