Second-Opinion Program

A COMPLIMENTARY SERVICE CREATED TO DELIVER THE REASSURANCE YOU DESERVE

As the economy and capital markets evolve, your financial needs may also evolve and require reevaluation. Perhaps you are simply unhappy with the advice from your current financial team—it's not uncommon. At Godfrey & Spradlin PWA, we have discovered that many successful families value a second opinion on their finances.

To help you outline and succeed in reaching your financial objectives, we have created our complimentary Second Opinion Program. We provide the same knowledge and guidance that each of our client families experiences throughout a relationship with our team.

WORKING WITH A TEAM THAT CUSTOMIZES THE WEALTH MANAGEMENT EXPERIENCE

Your life and goals are unique to you, shouldn't your financial plan and investment strategy match your individuality? You will find no cookie cutter, one size fits all, wealth management approach here. As a potential client of Godfrey & Spradlin PWA, however, you would benefit from an experienced team that has a distinct and comprehensive vision of wealth management.

FINANCIAL PLANNING

- Wealth Development Planning
- Cash Flow Analysis
- Tax Planning
- Liability Strategies
- Wealth Transfer
- Wealth Preservation Strategies
- Charitable Giving

INVESTMENT MANAGEMENT

- Risk Evaluation
- Portfolio Management
- Allocation Analysis and Oversight
- Stratactical Investment Process
- Performance Benchmarking
- Fundamental and Technical Analysis

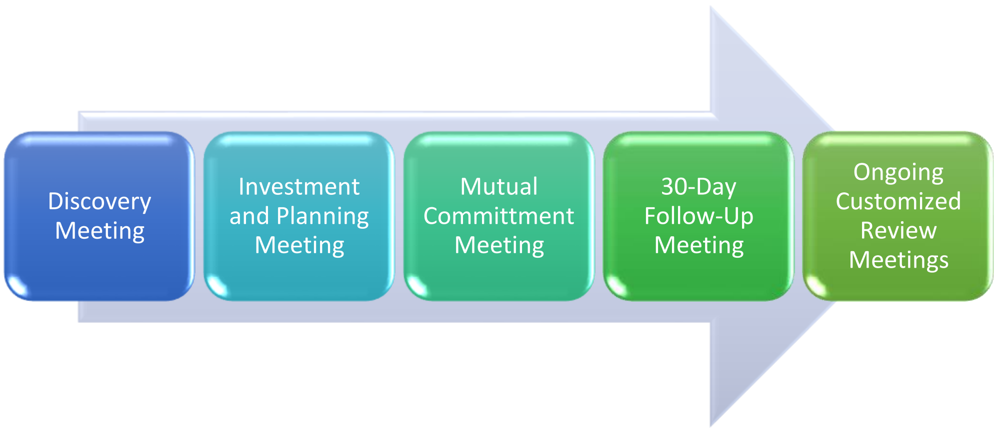
RELATIONSHIP MANAGEMENT

- Built on Mutual Trust
- Family Office Approach with Access to Legal, Tax, and other Professionals
- Customized Communication Schedule
- Full Fiduciary within Advisory Relationships
- State of the Art Technology Suite

OUR CONSULTATIVE APPROACH

We begin every new engagement with an established consultative approach. This creates open dialogue in which we learn about those goals most important to you and your family and allows us to create a custom plan to help achieve them. The flowchart below outlines a full relationship experience demonstrating our consultative process every family served by Godfrey & Spradlin PWA enjoys. Our second-opinion service affords you a portion of this experience at no cost.

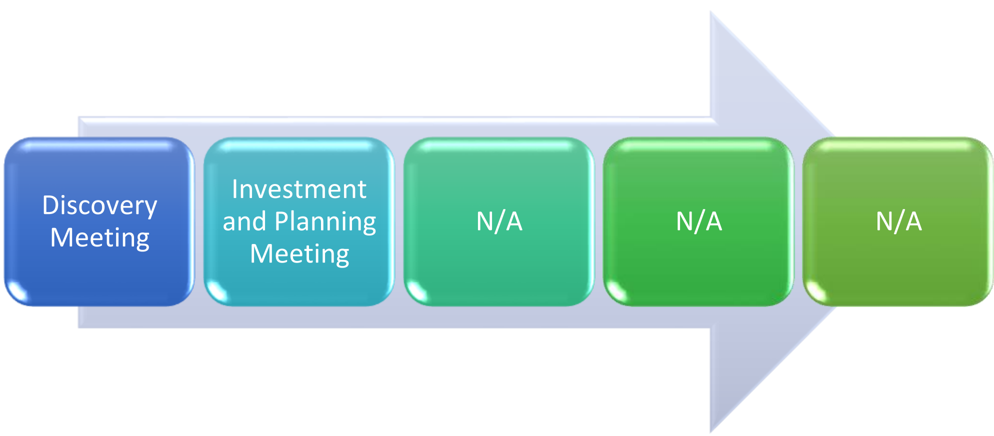
FULL CLIENT EXPERIENCE



WHAT YOU CAN EXPECT FROM OUR SECOND OPINION PROGRAM

As with our *Full Client Experience,* we begin with an initial Discovery Meeting. Assuming we both agree that a foundation exists for working together, an Investment and Planning Meeting would follow. In this meeting, we aim to either confirm that you are on track to achieve your objectives with your current strategy and team or we will recommend techniques in which we believe we can assist, including proposing another provider if we determine that we're not a good fit for your needs. Regardless, you will receive a customized analysis of your current position.

SECOND OPINION PROGRAM EXPERIENCE (NO COMMITMENT)



CONTACT US TODAY TO SCHEDULE YOUR SECOND OPINION APPOINTMENT

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