PLACEMAT OF SERVICES

THE
PARR McKNIGHT
WEALTH MANAGEMENT GROUP
CLARITY. CONFIDENCE. STRUCTURE.

Second Half Planning (Pre/Post Retirees)

- Design Durable, Lifecycled, Tax Efficient Income
- Social Security and Medicare Planning and Optimization
- Longevity and Extended Care Planning
- Roth Conversion and RMD Strategies
- Focus on Legacy and Estate Planning

Business Owners and Entrepreneurs

- Cash Flow Management and Access to Capital via Affiliates
- Strategic Business Advice
- Retirement and Business Succession Planning
- Benefits Analysis and Integration
- Focus on Legacy and Estate Planning

Corporate Executives

- Compensation & Benefits Analysis and Maximization
- ISO, RSU, NQSO, PSU, Deferred Compensation
- Concentrated Equity Planning (IOU , 10b-51)
- Income Generation via Covered Call Strategies
- Cash Flow, Tax, Retirement and Estate Planning

Listen, Understand, Clarify & Organize

- Understand Family Goals, Values and Dynamics
- Gather Critical Information Securely
- Identify and Triage Financial and Life Priorities
- Organize Your Financial Life
- Digital Financial Dashboard

Financial Planning & Tax Control

- Implement eMoney Plan: Goal Analysis
- Develop Personal Financial Statements
- Identify Key Cash Flows / Balance Sheet Optimization
- Education Funding and Planning
- Lifetime Tax Minimization Strategies and Tax Return Review

Personalized Investment Strategies

- Liquidity, Income, Growth, Tax Advantaged
- Indexed and Managed Individual Equity Strategies
- Customized Tax Free Bond Portfolios
- Income Generation Strategies
- Alternative Investments

Wealth Transfer and Legacy Planning

- Complimentary Estate Document Review
- Estate and Wealth Transfer Strategies
- Intentional Lifetime Giving Plan
- Philanthropic Giving: Mission Statement and Strategies
- Trust Services via Affiliates / Trust Policy Statements

Liquidity, Income and Cash Flow Planning

- Banking / Lending Services Through Affiliates
- Forecast and Develop Spending Plan
- Securities Based Lending
- Cash Management & Optimization
- Cash and Cash Flow Management

Asset Protection Planning

- Insurance Needs Analysis IOU
- Insurance Policy Review
- Strategically Placed Insurance Solutions
- Long Term Care Solutions
- Key Person Insurance Planning

Comprehensive Family Wellness

- Next Gen Counseling and Planning
- Intergenerational Family Meetings
- Trusted Advisor Collaborative Meetings
- Wellness Optimization / Work Life Balance
- Professional Introductions
- Personal CFO Offering

Please see important disclosures on the next page.

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CLIENT'S PRICING GUIDE

ADVISED ASSET LEVEL	
$75mil +	0.35%
$50mil - $75mil	0.40%
$30mil - $50mil	0.50%
$20mil - $30mil	0.75%
$10mil - $20mil	0.80%
$5mil - $10mil	0.85%
$1mil - $5mil	0.90%
$.5m - $1mil	1.25%
Under $.5mil	1.50%

IMPORTANT DISCLOSURES

There is a minimum fee to maintain this type of account. Advisory accounts are not designed for excessively traded or inactive accounts, and may not be appropriate for all investors. During periods of lower trading activity, your costs might be lower if our compensation was based on commissions. Minimum account sizes will apply.

There are additional costs associated with certain products & strategies such as private account managers, mutual funds or exchange traded funds.

The Parr McKnight Wealth Management Group, LLC ("PMWMG") is a federally registered investment advisor under the Investment Advisers Act of 1940.
Registration as an investment advisor does not imply a certain level of skill or training. The communications of an advisor provide you with information about which you determine to hire or retain an advisor. Information about PMWMG can be found by visiting the SEC site www.adviserinfo.sec.gov. and searching by our firm name.