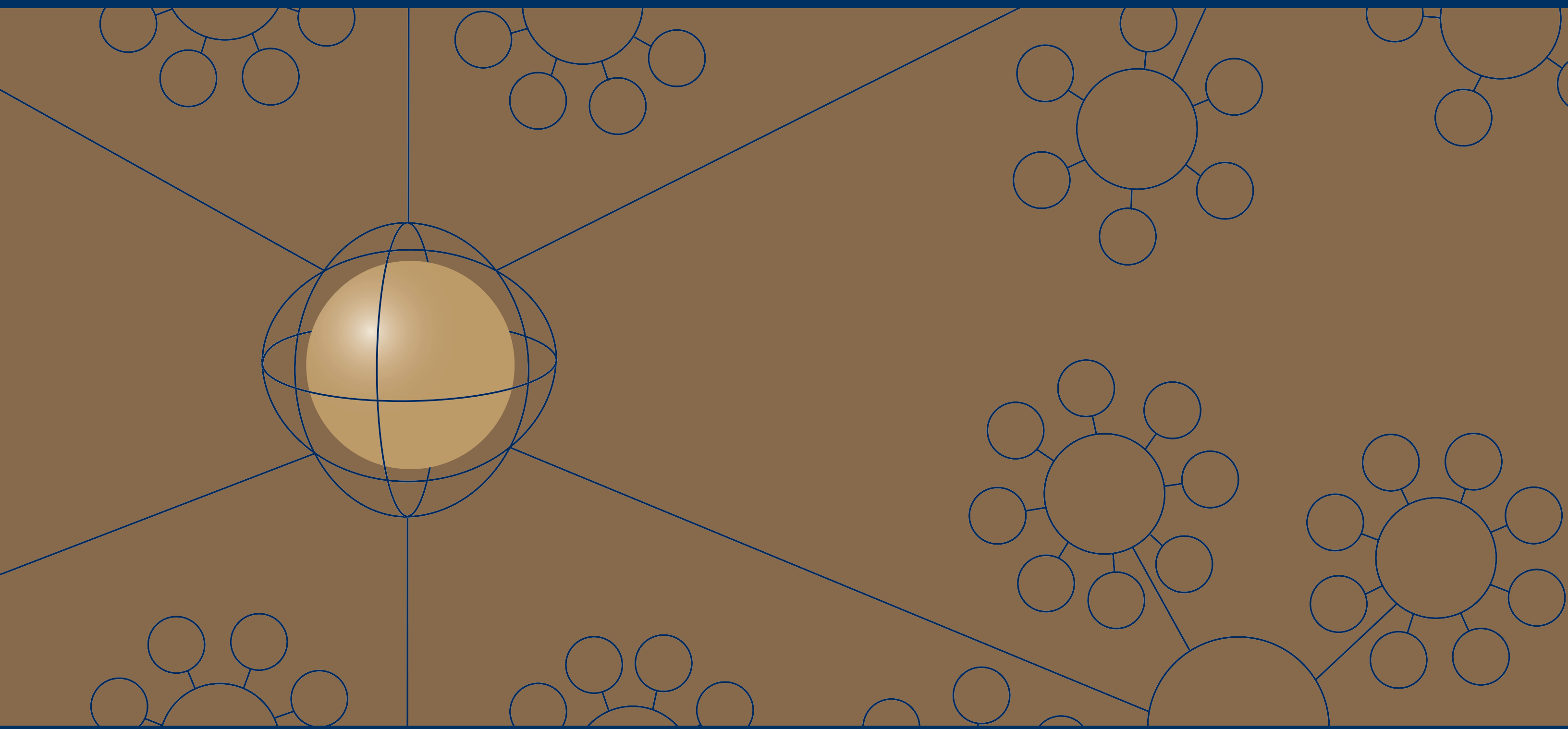
YOUR GUIDE TO THE WEALTH MANAGEMENT UNIVERSE OF POSSIBILITIES



GOLDFINCH
WEALTH MANAGEMENT

THE MOLECULAR MAP OF WEALTH MANAGEMENT

Hundreds of elements make up the vast interconnected universe that is wealth management. Take a look at how partnering with an experienced guide can help you manage the complexity to pursue your goals.

PARTNER WITH A SPECIALIST

No matter your level of wealth, we can help you take advantage of a comprehensive process for managing your financial life and create a long-term plan customized to your objectives. We'll start by examining the wealth management universe and its six modules:

- ACCUMULATION: HOW TO TARGET ASSET GROWTH
- RETIREMENT PLANNING: HOW TO TARGET DISTRIBUTION OF YOUR ASSETS IN A TAX-ADVANTAGED WAY
- ESTATE PLANNING: HOW TO PRESERVE YOUR ASSETS
- RISK MANAGEMENT: HOW TO PROTECT YOUR ASSETS
- BUSINESS PLANNING: HOW TO GROW AND MANAGE YOUR BUSINESS
- TAXATION: HOW TO MINIMIZE YOUR TAX BURDEN

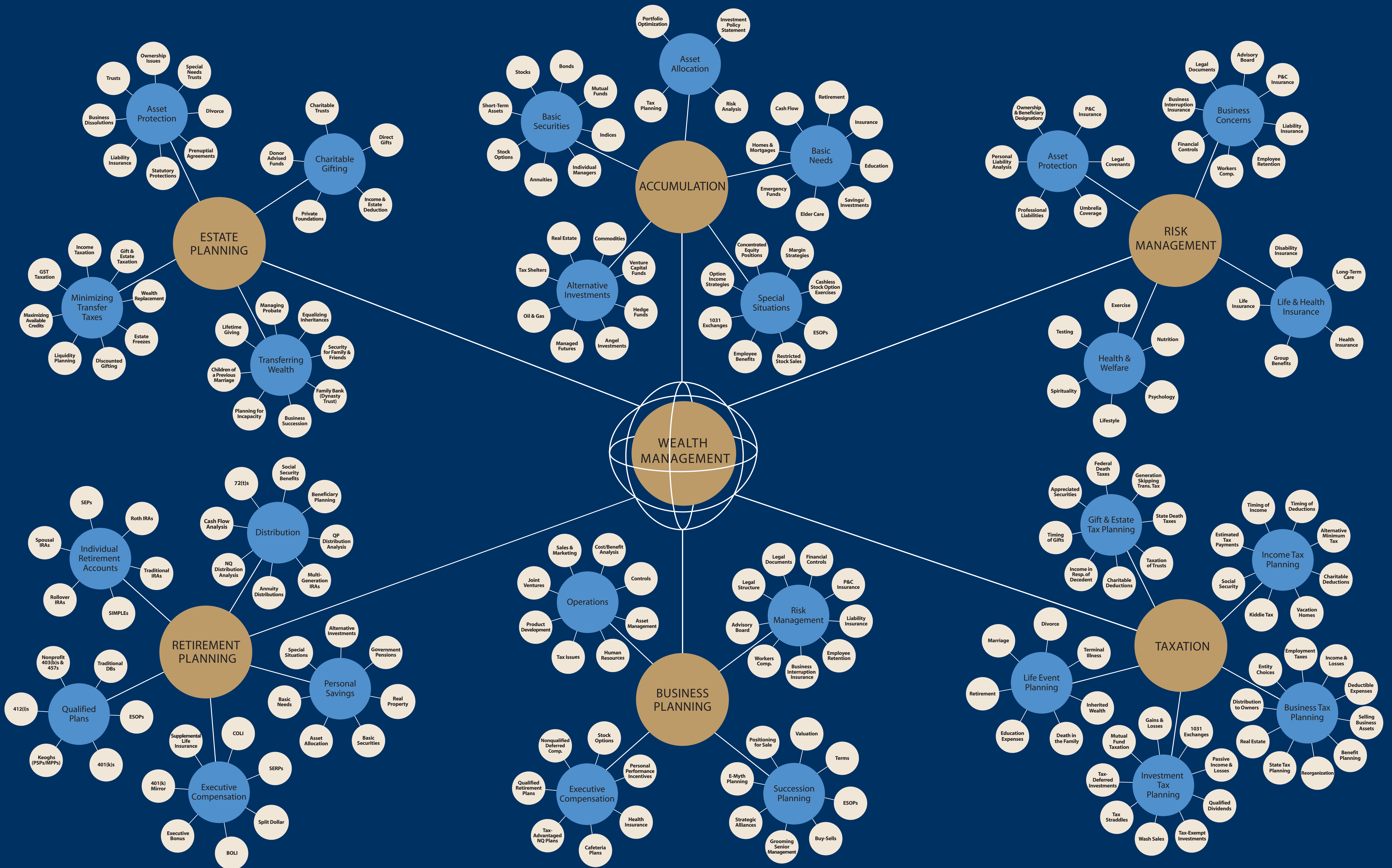
CREATE A COMPREHENSIVE PLAN

By exploring each module in detail, we'll determine which ones require our immediate attention and which ones are more long-term in nature. From our findings, we'll assemble an implementation plan.

PURSUE YOUR FINANCIAL GOALS

We look forward to working together with you to simplify and manage your financial life for the long term.

THE CORE ELEMENT OF YOUR FINANCIAL SUCCESS IS THE ADVISOR-CLIENT RELATIONSHIP.



GOLDFINCH
WEALTH MANAGEMENT

Roy P. Janse, CFP®, AIF®
CERTIFIED FINANCIAL PLANNER™ professional
Accredited Investment Fiduciary®

Ashton Lawrence, CFP®, ChFC®, AIF®
CERTIFIED FINANCIAL PLANNER™ professional
Chartered Financial Consultant®
Accredited Investment Fiduciary®

Goldfinch Wealth Management
325 Rocky Slope Rd. | Suite 302 | Greenville, SC 29607
Phone: 864-375-4700 | Fax: 864-375-4700
goldfinchwealth.com

AMKTG-2227-43657_01/21