**New Client Guide**

**Advisors of WXYZ Wealth Management**

**About Our Advisors**

The advisors of WXYZ Wealth Management have more than 30 years of combined industry experience.

Our advisors are all CFP Professionals® who adhere to the fiduciary standard.

**Joe Advisor, CFP, CFA**

**Founder & CEO**

402.555.5555

**Jane Advisor, CFP**

**Senior Wealth Advisor**

402.555.5555

**John Advisor, CFP**

**Wealth Advisor**

402.555.5555

**WXYZ Wealth Management Client Service**

**The Platinum Rule**

We don’t treat our clients the way we want to be treated; we treat you the way YOU want to be treated.

When you contact your WXYZ Wealth Management team, you can expect top-notch, timely service.

**Sally Sample**

**Director of Operations**

*phone* 402.555.5555

sally.sample@wxyzwealth.com

* Service Team Leader

**Tom Sample**

**Client Marketing Associate**

*phone* 402.555.5555

tom.sample@wxyzwealth.com

* Event Registrations
* Appointment Scheduling

**Mary Sample**

**Operations Associate**

*phone* 402.555.5555

mary.sample@wxyzwealth.com

* Service Requests

**Bruce Sample**

**Paraplanner**

*phone* 402.555.5555

bruce.sample@wxyzwealth.com

* Client Review Preparation

**Holistic Wealth Management Services**

**About Our Clients**

At WXYZ Wealth Management, we serve an exceptional group of clients.

We love working with clients who:

* Believe in the power of working with trusted professionals
* Focus on what’s important in life
* Value personal relationships with family and friends

**Holistic wealth management services include:**

* Comprehensive financial planning
* Diversified investment management
* Coordination with CPAs & Attorneys
* Regular review meetings
* Financial decision counseling
* Beneficiary review
* Life insurance needs analysis
* Disability needs analysis
* Roth conversions
* RMDs and withdrawal strategies
* College planning
* Gifting
* Tax loss harvesting
* Review of cost basis
* Tax return review
* Tax planning
* Cash flow and budget analysis
* Monitoring of outside accounts
* Retirement goal-setting
* Legacy planning
* Pension maximization
* Social security analysis
* Online account access

**Client Events & Communication at WXYZ Wealth Management**

**Events & Communication**

WXYZ Wealth Management believes an educated client is a happy client.

You’ll hear from us regularly through emails, phone calls, and in-person meetings.

In addition, we hold a variety of educational and appreciation events for our clients.

We often team up with locally-owned businesses to showcase their products and services by hosting events at their location or serving their food and drinks. It’s a great way to help the community grow!

**Transparent Client Communications:**

* Trade notifications
* Weekly Market Commentary
* Monthly Commentary
* Quarterly Investment Committee Videos
* Infographics
* Whitepapers

**Client Events:**

* January Market Forecast Presentation
* July Half-time Report Presentation
* Estate Planning Workshops
* Tax Planning Workshops
* Annual “Shred” Day
* Annual Client Appreciation Open House
* Targeted Interest Events
* Summer BBQ and Family Fun Event

**Viewing Your Accounts and Plan Online**

**Check out our website!**

More than just a portal to view your accounts online, our website is your one-stop location for up-to-date information about WXYZ Wealth Management.

Log on to wxyzwealth.com to stay up-to-date with our latest blog posts, upcoming events, team changes, and more.

**Client Login:**

* Log on to wxyzwealth.com
* Click on “Client Login”
* Choose the portal you wish to view (custodian or financial planning)

**Plan Portal First-Time Login:**

* Click on “Registration”
* Use your **email address** as the username
* Your temporary password is **wxyz**

**Custodian (Account) First-Time Login:**

* Click on “Registration”
* Use your **social security number** as the username
* Your temporary password is your **zip code**

**Get Involved with WXYZ Wealth Management**

**Planning with Purpose**

At WXYZ Wealth Management, we offer our clients a number of ways to get involved, meet new friends, and help us support the local community!

We facilitate client clubs around specific interests and regularly volunteer at community events. Our internal stakeholders support over 75 local charities!

**Client Clubs:**

* Travel Club
* Health and Wellness Club
* Fine Arts Club
* Food and Festivities Club

To learn more about our client clubs, contact Tom Sample at 402.555.5555 or tom.sample@wxyzwealth.com

**Charities We Support:**

* Dreamweaver Foundation

http://www.thedreamweaverfoundation.org/

* New Visions Homeless Services

http://www.mohmsplace.org/

WXYZ Wealth Management gives back to the community through our annual “WXYZ Gives” volunteer day, Friday jeans days, and gift matching program. To learn how you can join us in supporting our local community, contact Sally Sample at 402.555.5555 or sally.sample@wxyzwealth.com.

**When You Make an Introduction**

**Know Someone We Should Meet?**

WXYZ Wealth Management’s growth comes primarily through introductions by our current clients.

We’re honored when you refer us to your family and friends. Our commitment to you is to treat your referrals with honesty, transparency, and the highest levels of professionalism.

**Making the Introduction:**

There are a number of ways for you to introduce your friends and family to us in a no-pressure environment. Reach out to us at 402.555.5555 if they are ready to schedule an appointment or invite them to one of our events:

* Educational events
* Social events
* Lunch and coffee meetings

**Our Commitment:**

For friends and family of our current clients, we offer a complimentary consultation to discuss needs and determine how we may be able to help. Rest assured that private information is never shared, and we will serve your friends and family with the same care and dedication with which we serve you.

**Clients We Serve:**

Over the years, we’ve found that there is a specific client profile who benefits the most from an engagement with WXYZ Wealth Management. These clients:

* Are concerned with leaving a legacy that will outlive themselves
* Value and act upon the advice of professionals
* Turn to us when they are at a crossroads: retirement, sale of a business, death, divorce, or inheritance
* Believe there is more to life than money