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SERVICE COMMITMENT

Investment Advisory

Our goal is to equip you with the right tools at the right times for your financial plan. In order to do this most effectively, we are committed to providing you with a high-quality and high-touch service model designed around your specific needs.

Through technology, unique planning strategies and specialized consulting, our team of experts is in place to help you meet your financial goals.

- ✓ 24 Hour Online Account Access
- ✓ Monthly Market Commentary
- ✓ Ongoing Operational Support
- ✓ Periodic Review Meetings
- ✓ Portfolio Adjustments & Rebalancing
- ✓ Risk Tolerance Assessment
- ✓ Portfolio Distribution Strategy Implementation
- ✓ Asset Location Implementation
- ✓ Asset Ownership/Registration Review
- ✓ Beneficiary Review



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Investment advisory and financial planning services offered through Simplicity Wealth, LLC, a SEC Registered Investment Advisor. Subadvisory services are provided by Advisory Alpha, LLC, a SEC Registered Investment Advisor. Insurance, Consulting and Education services offered through Ward & Associates Financial Group. Ward & Associates Financial Group is a separate and unaffiliated entity from Simplicity Wealth, LLC and Advisory Alpha, LLC.

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