Is your portfolio keeping up?

Are you maximizing market opportunities?

Get a **second opinion** and find out.

Certified B Corporation

ARNERICH MASSENA

FOUNDED IN 1991

FIRM AUM: $2.1 B

100% EMPLOYEE-OWNED

PARTLY WOMEN-OWNED AND LED

FIDUCIARY
We explicitly acknowledge our fiduciary status in all advisory relationships.

Arnerich Massena's complimentary second opinion service is offered at no cost or obligation for qualified prospects. Find out today if you are on track to meet your financial goals and aspirations.

Whether you are satisfied with your current advisor and portfolio or are experiencing concerns, getting a second opinion is always valuable. We offer our second opinion service because your peace of mind is our purpose, and that comes from having confidence and trust that you are making the most of your resources.

- **Is your portfolio aligned with your goals, risk tolerance, and values?**
- **Is your asset allocation maximizing the power of diversification?**
- **Does your strategy incorporate current market opportunities?**
- **Are your fees in line with industry averages and the services you receive?**
- **Are you on track to meet your long-term financial goals?**

Arnerich Massena's second opinion service is designed to answer these questions by taking a detailed look at your financial picture, assessing your portfolio and financial plan, and providing broad recommendations for any potential improvements or adjustments. It's up to you what steps you'd like to take from there.

Take a look at the following page to learn what to expect from your free second opinion consultation.

Second Opinion Service Process:

Listen.

Every family and individual is different. Understanding your financial goals, values, aspirations, and relationship to your finances is the first step of our consultation. We aren't about cookie cutter portfolios; in order to assess your strategy, we need to **understand who you are and what your objectives are** first.

This process usually includes two steps: an **exploratory call** to make sure our second opinion process will be helpful to you, and a **discovery meeting** so we can gather specific information as we learn more about you.

Collaborate.

We craft a **total client profile** of the key aspects of your finances and long-term goals, and then our experienced team uses their collective knowledge and experience to craft a **bespoke strategic assessment**.

Share.

The final step is the **initial findings meeting**, in which we present our **preliminary financial analysis and recommendations**. We'll discuss our thoughts with you and provide you with your written profile and analysis. From there, it's up to you; we are available to assist in any way we can.

Arnerich Massena Wealth Management: We've got you covered.

At Arnerich Massena, we care about making sure that all your financial needs are taken care of.

Investment consulting

Portfolio management

Asset allocation

Manager research and due diligence

Risk mitigation

Tactical opportunities

Advanced wealth planning

Cash flow planning

Tax strategies

Wealth transfer and family governance

Charitable giving strategy and planning

Business succession planning

Coordination of your professional team

Partnership

Regular meetings to review your portfolio

Team of professionals who understand your financial picture

Any-time availability

Personalized service

Use the QR code or visit **www.arnerichmassena.com/contact** to get your second opinion process started today.