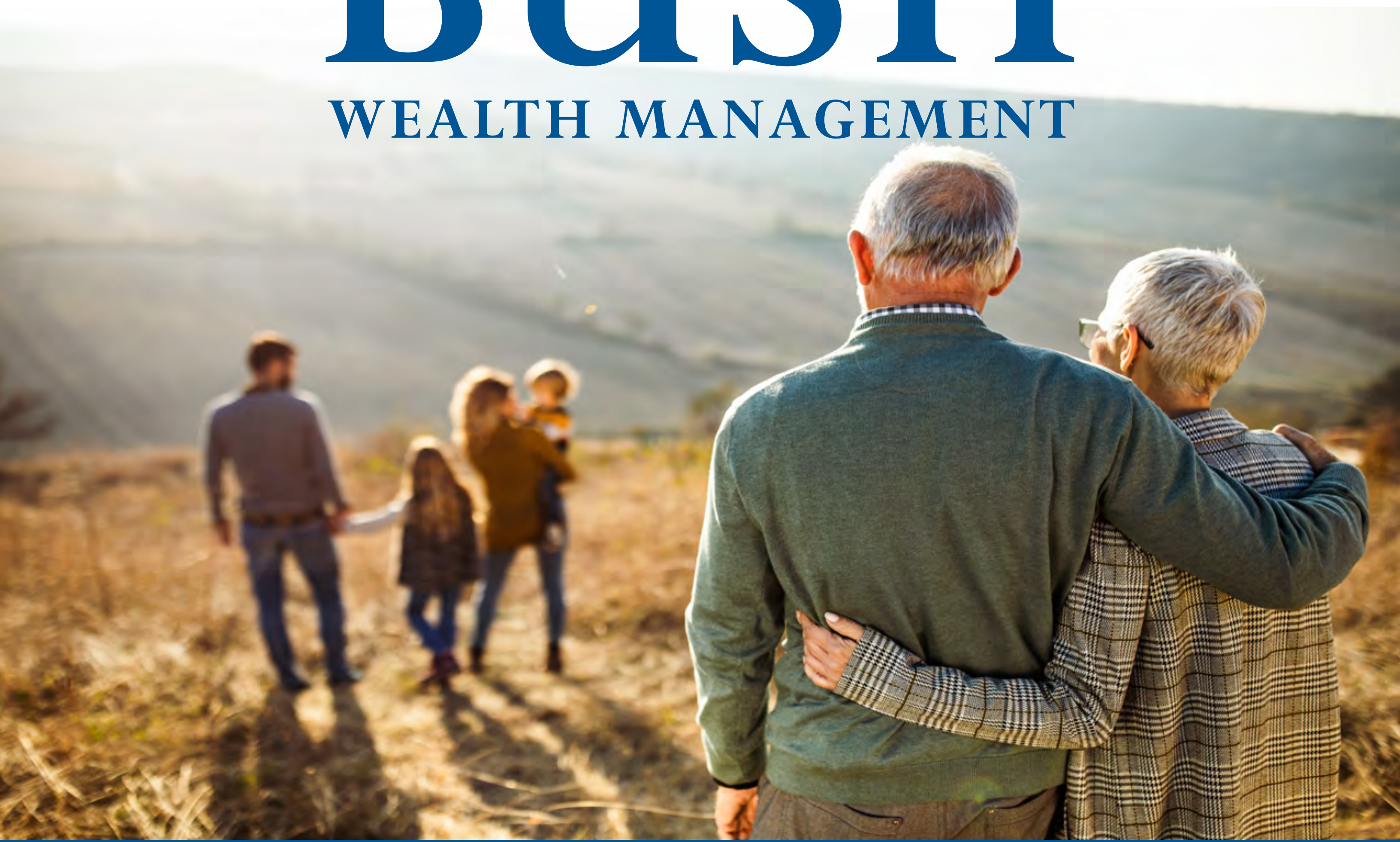
WE EMPOWER PEOPLE TO LIVE COMFORTABLY BY PLANNING WISELY.

BUSH

WEALTH MANAGEMENT



OUR MISSION

Every person, family and business has a different set of priorities for what they want their money to accomplish. Whether it's to save for retirement, put children through college, or simply leave a long, lasting legacy; we focus on your individual goals.

We are not a one-size fits all wealth management firm. Our team pride themselves on creating personal, goal oriented, and comprehensive strategies. We strive to equip our clients with the knowledge and confidence to make the best decisions for their family.

SINCERELY,
BUSH WEALTH MANAGEMENT

QUALIFICATIONS & PHILOSOPHY

Bush Wealth Management has been helping clients work towards their financial goals since 2004. We specialize in working with:

- Individual Investment Accounts
- Foundations
- Affluent Households
- Trust Accounts
- Endowments
- Retirement Plans

Our holistic wealth management approach is customized to address your unique financial needs and objectives. We follow a comprehensive process designed to determine the optimal approach to managing your assets.

DISCOVERY: Understanding your personal, professional and financial life goals

EDUCATION: Discuss the risk and reward characteristics of different asset classes and their contribution to the overall portfolio asset allocation

RECOMMENDATIONS: The optimal blend of options to meet your goals

IMPLEMENTATION: The strategy employed to construct your wealth plan

ACTIVE MANAGEMENT: Regular performance reviews and plan updates

"IN LIFE, THE PERSONAL RELATIONSHIPS FORGED BY TRUST ARE MORE COVETED THAN WEALTH ALONE; WE VALUE THOSE RELATIONSHIPS."

BUSH WEALTH MANAGEMENT

COMPREHENSIVE FINANCIAL PLANNING

Focusing on a select group of clients allows us to offer you world class, red carpet service. You can rely on us for all your financial needs, entrusting us to create comprehensive investment strategies for your assets.

Our comprehensive financial services and strategies:

- Asset Allocation
- Risk Assessment
- Tax Planning
- Portfolio Management
- Insurance Planning
- Business Succession
- Education Planning
- Retirement Projections
- Defined Contribution Plans
- Rollover Strategies
- Roth IRA Conversions
- Estate Planning
- Social Security Analysis

DISCOVERY MEETING

Learning about you, learning more about us and if we are a good fit for each other.

RECOMMENDATION MEETING

Presentation of investment plan and recommendations.

COMMITMENT MEETING

Answer questions, make confirmation of our commitment to work together.

DOCUMENT SIGNING

Complete paperwork we create to handle all details regarding the transfer of accounts.

ORGANIZATIONAL MEETING

Organize statements, review progress of implementation of wealth plan.

OUR CLIENTS

We specialize in helping people with a minimum of $250,000 investable assets make the transition from work life into retirement, such as retirees from the following organizations:

- Packaging Corporation of America (PCA)
- Georgia Power – Southern Company
- Tri-County Electric
- Lowe's Distribution Center
- South Georgia Medical Center
- Valdosta State University
- Wiregrass Technical College
- Small Business Owners
- State and Government Employees

You Will Love Us If:

- You are a financial delegator
- You have mutual respect and value our work together
- You appreciate exceptional client service
- You understand we cannot control the market

You Will Not Like Us If:

- You think the world revolves around the daily news cycle
- You scream and shout every time the market drops
- You are looking for the next hot stock tip
- You expect us to time the market

MATERIALS TO REVIEW

PLEASE SEND OR BRING THE FOLLOWING ITEMS TO OUR OFFICE*

PERSONAL

- Most recent investment statements (401K, IRA, Roth IRA, etc...)
- Most recent Social Security benefits statement
- Life insurance policies
- Long-term care insurance policies or statements
- Annuity statements
- Most recent federal and state income tax returns
- Values of titled personal assets
- Most recent bank statement

BUSINESS

- Current profit and loss statement
- Buy-sell agreements
- Business insurance policies, statements and illustrations
- Retirement plan document

*Provide only materials that are applicable to your situation.

EXCEEDING EXPECTATIONS

At Bush Wealth Management, our clients are like family. We will guide you to make the appropriate decisions for your financial future so you can sit back and enjoy life with the ones you love.

Stacy Bush, AIF® CDFA®
President/CEO, Wealth Advisor

Courtney Gooding
Partner, CCO

Kent Patrick, CRPC®
Partner, Wealth Advisor

BUSH
WEALTH MANAGEMENT

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This information should not be construed by any client or prospective client as the rendering of personalized investment advice.