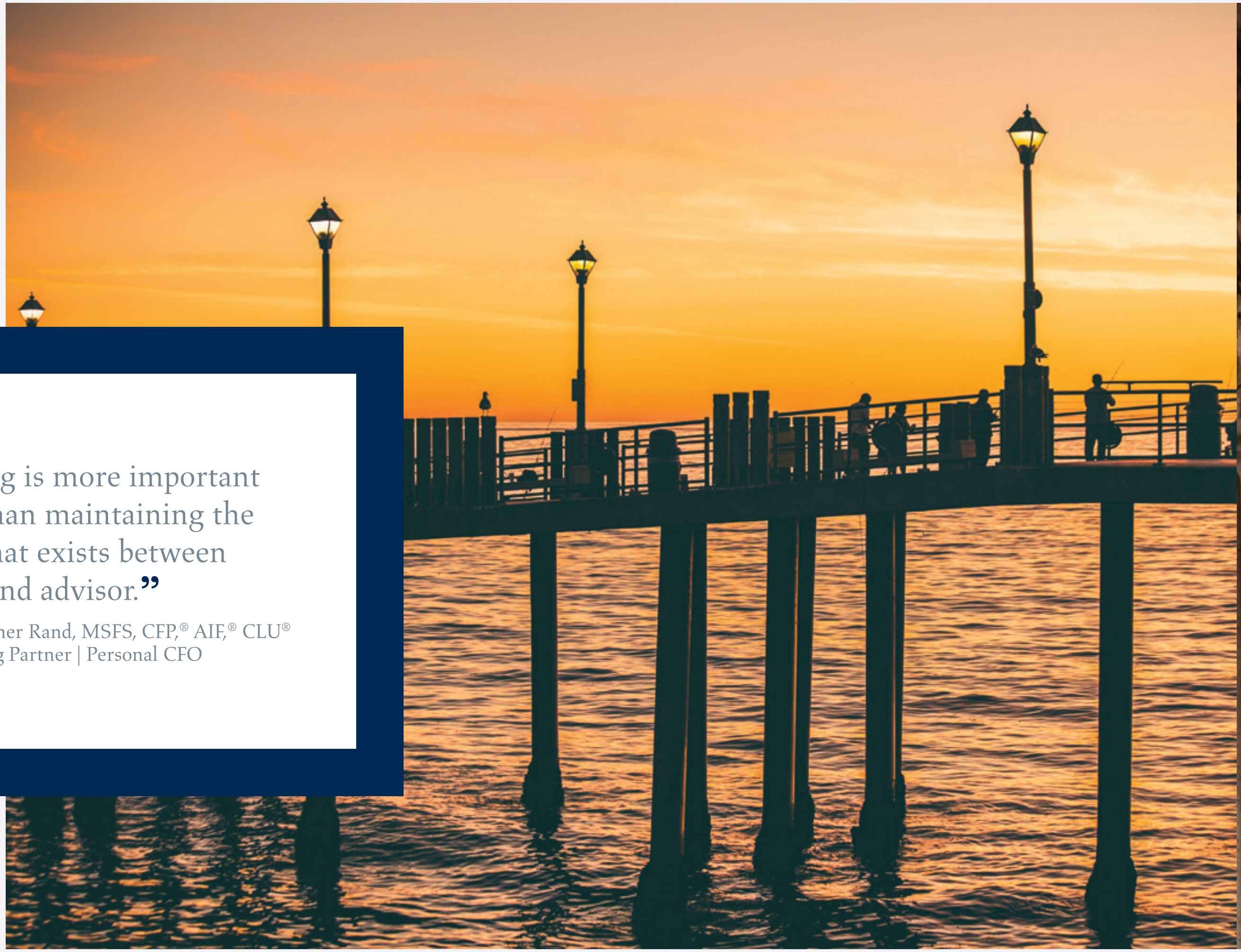
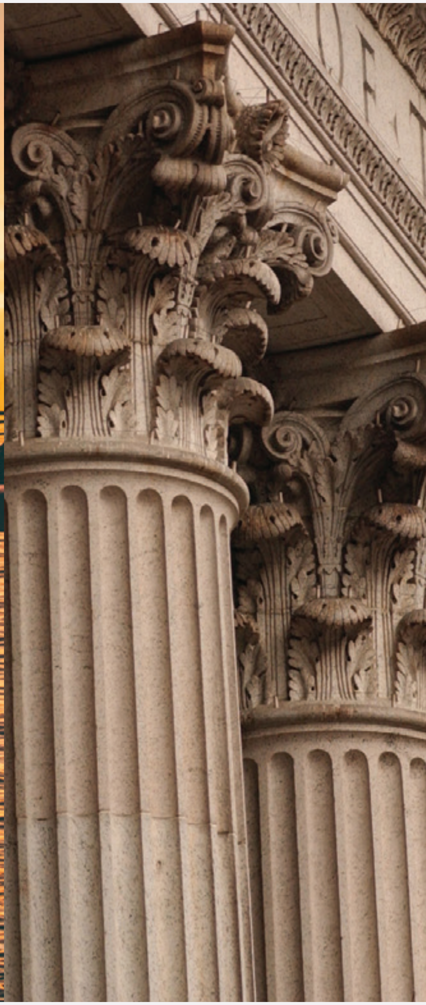
FIDES®

WEALTH STRATEGIES GROUP

TRUST | INTEGRITY | SERVICE





"Nothing is more important to us than maintaining the trust that exists between client and advisor."

– Christopher Rand, MSFS, CFP,® AIF,® CLU®
Managing Partner | Personal CFO

Built on a Foundation of Trust

At FIDES Wealth Strategies Group (WSG) we believe that trust, integrity and service are essential to developing long-term relationships that place client interests first. As a result, earning and maintaining our clients' trust has always been at the very core of what we do.

Rely on FIDES WSG to Place Your Interest First

In ancient Rome, "FIDES" was the goddess of trust. The word "FIDES" means "reliability," referring to the sense of trust between two parties if a relationship between them is to exist. For the Romans:

- FIDES was an essential element in the character of a man of public affairs, and a necessary constituent element of all social and political transactions.
- FIDES was always reciprocal and mutual, and implied privileges and responsibilities on both sides.
- In both public and private life, the violation of FIDES was considered a serious matter, with both legal and religious consequences.
- FIDES was one of the first of the "virtues" to be considered an actual divinity by the Romans.

Sources: The Roman Concept of Fides by John Paul Adams, CSUN; en.wikipedia.org/wiki/Fides

At FIDES WSG, our advisors bring more than 35 years of collective experience serving as our clients' personal financial advocates and guides. We seek to provide objective advice and financial strategies customized to each client's individual needs and goals.

We believe that:

- Helping you make the right investment, retirement and insurance planning decisions is critical to pursuing your goals.
- Confidence comes from knowing that you are working with someone you can rely on.
- Our clients trust us to lead them confidently toward the future they desire because we consistently place their interests first.

Importance of Obtaining Professional Financial Guidance

True wealth management is never a once-and-done exercise, but a comprehensive and ongoing process focused on protecting and managing all aspects of your family's wealth. At FIDES WSG, planning forms the core of our approach that seeks to place your interests first as we consider and weigh important cash flow, risk management, asset management, estate planning and tax considerations in every decision made and every action taken.

Working together with an independent advisor who is experienced, well-versed, and knowledgeable about investing and financial planning, and remains abreast of today's rapidly changing financial markets and global economy can help you:

- Simplify your financial life
- Pursue specific retirement and legacy planning goals
- Invest based on your specific goals and risk tolerance
- Employ tax-advantaged strategies that seek to protect and grow a lifetime of assets

Why FIDES WSG?

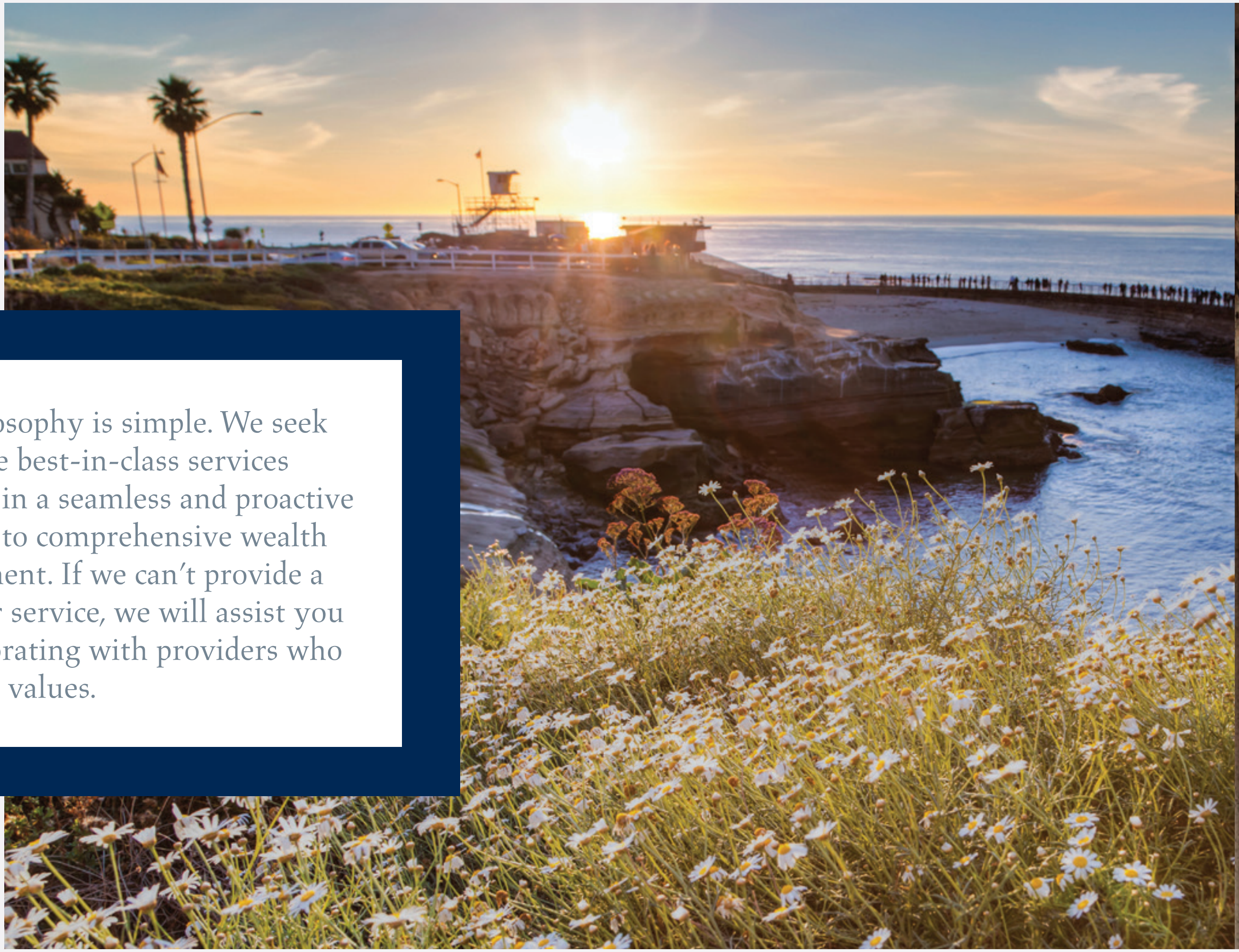
Our experienced team of advisors and associates are well versed in all aspects of wealth planning for individuals, families and business owners. Our advisors are leaders in the industry and sought-after by local and national media for commentary and insight, and by a broad range of organizations for speaking engagements and seminars for conferences, industry associations and events. Many have met the stringent requirements necessary to acquire advanced education degrees, industry certifications, and designations, including:

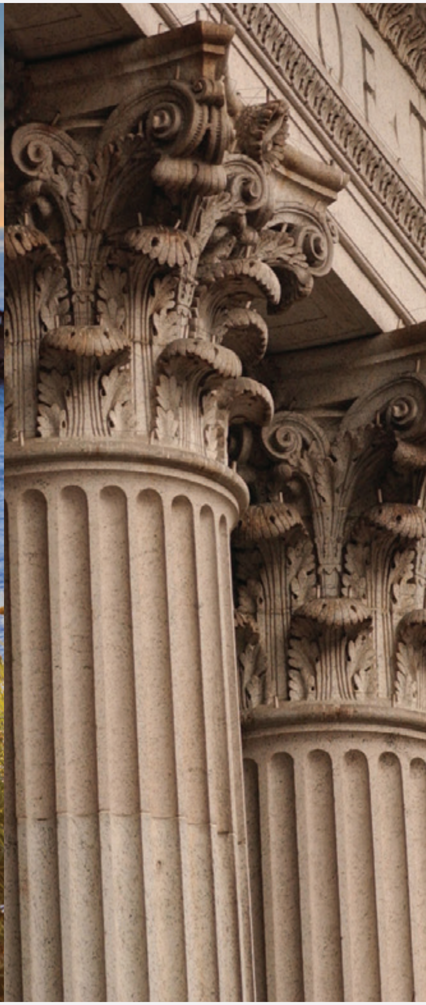
- Certified Financial Planner™ (CFP®)
- Accredited Investment Fiduciary® (AIF®)
- Chartered Life Underwriter (CLU®)
- Chartered Advisor for Senior Living® (CASL®)
- Masters of Science in Financial Services

Designations and certifications vary by advisor. Visit www.FidesWealth.com to learn more about our team and to view individual advisor designations and credentials.

“Our objective for all of our clients is to design a financial plan based on their goals and priorities, coupled with our experience and guidance.”

– Marc A. Gallo, CASL®, AIF®
Managing Partner | Personal CFO





Our philosophy is simple. We seek to provide best-in-class services resulting in a seamless and proactive approach to comprehensive wealth management. If we can't provide a particular service, we will assist you in collaborating with providers who share our values.

Coordinating Strategies Across All Aspects of Your Financial Life

As your trusted financial steward, we seek to bring the full spectrum of wealth management capabilities and resources necessary to address your complex financial needs. We collaborate with your other professional advisors, including attorneys and accountants, to help ensure the seamless coordination of your financial strategies in a manner that places your interests first, in these and other important areas:

- Financial Planning
- Retirement Planning
- Investment Management
- Education Planning
- Tax Planning Strategies
- Insurance Planning
- Estate & Legacy Planning

Benefit From a Holistic Approach That Places Your Interests First

Our highly personalized and comprehensive financial and investment planning process begins with listening to you, analyzing your situation, circumstances, goals and objectives, and recommending strategies to help you pursue your needs. Following the implementation of your plan, we seek to continually monitor your progress against established objectives to help you remain on track as you pursue your goals.

As independent advisors and financial planners, FIDES WSG:

- **Provides objective advice** that serves to place your best interests first in all recommendations and decisions made
- **Serves as your financial steward**, coordinating the many aspects of your financial life and continually monitoring your investment strategy
- **Offers a full universe of non-proprietary investment products** and services from the nation's leading financial firms
- **Develops customized strategies** for today's income needs and tomorrow's goals
- **Proactively helps you take advantage of opportunities** while helping to protect the wealth you have built and the legacy you desire

Our Strategic Partners

The Wealth Consulting Group

FIDES WSG is an independent wealth management firm affiliated with the Wealth Consulting Group (WCG), a leading independent registered investment advisor (RIA) firm headquartered in Las Vegas, Nevada, with offices conveniently located throughout the Southwest. WCG serves as our office of supervisory jurisdiction and provides FIDES WSG with access to certain services and capabilities that complement our existing team and offering. WCG enables us to serve a broader range of highly specialized and complex client needs, including access to WCG professionally managed model portfolios.

Powered by LPL Financial

In addition to WCG, our independence is powered by LPL Financial, the nation's largest independent broker/dealer.* The firm provides access to a comprehensive array of tools and resources for independent financial advisors, enabling us to provide objective financial guidance to our clients. LPL has no proprietary products. LPL provides custodial services, client account statements, 24/7 online access to account balances and holdings, custom reporting, independent investment research and other services that enable us to provide you with an unparalleled client experience.

*As reported by *Financial Planning* magazine, June 1996–2019, based on total revenue.

Contact us today to schedule a no-obligation consultation to discuss your needs.

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