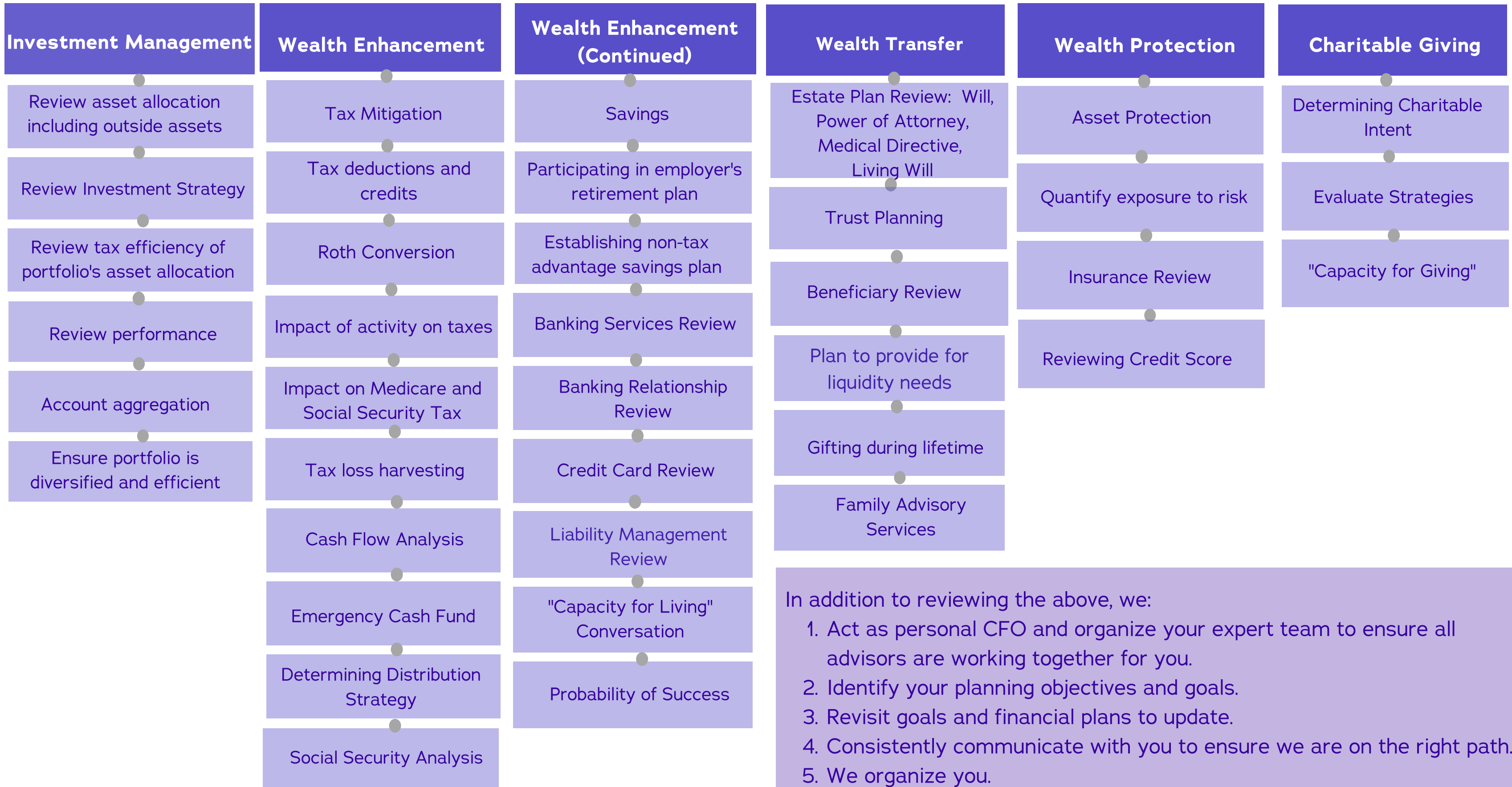




# INTERCHANGE

CAPITAL PARTNERS

## Wealth Management Defined



In addition to reviewing the above, we:

1. Act as personal CFO and organize your expert team to ensure all advisors are working together for you.
2. Identify your planning objectives and goals.
3. Revisit goals and financial plans to update.
4. Consistently communicate with you to ensure we are on the right path.
5. We organize you.