



**SILVERLEAF**  
WEALTH MANAGEMENT



THE ART OF INVESTED RELATIONSHIPS



## Our Mission

We are committed to maintaining the highest standards of integrity and professionalism in our relationship with you, our client. We endeavor to know and understand your financial situation and provide you with only the highest quality of information, services, and products to help you make sound financial decisions now and in the future.



## THE ART OF INVESTED RELATIONSHIPS

At Silverleaf Wealth Management in Omaha, NE, we understand that each of our clients face unique challenges in their finances.

We can help take the mystery out of preparing for today and tomorrow. Whether your goal is preparing for retirement, college savings, tax planning, or estate strategies – our personalized service helps you address your needs, wants, financial goals and objectives for many years to come.

Our team has years of experience in financial services. We work with you as your fiduciary partner now and through all stages of your life.



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Knowledge is power. It's also the foundation for intelligent, well-considered decisions. When you have retirement in sight, sound decisions are vital in helping you pursue your goals and avoid costly mistakes that can affect your future.

As financial professionals, we are committed to helping people just like you create strategies for their retirement assets. Once we understand your risk tolerance, time horizon and goals, we'll work diligently to develop a program that carefully balances investment strategies while striving to preserve principal.

Today's economic environment brings challenges. But along with challenges come opportunities and potential rewards. We work closely with our clients to evaluate those opportunities and get in position to reap those rewards. We enjoy helping people build a solid financial foundation for the future.

*What does financial independence mean to you? A comfortable retirement? Starting your own business? Leaving a legacy? Having the means to travel and explore? Whatever your goals, we want to help you reach them.*

We know financial planning for families of today is easier said than done.

From managing debt to saving for college to retirement, these personal finance challenges can be overwhelming. Our commitment is to utilize all of our resources to give you confidence and help you pursue your goals.

We believe in thinking “out of the box,” and we are not afraid to challenge conventional wisdom in our approach to investing and preserving wealth. All of our energy, commitment, and efforts are focused on you, the client, and your financial independence.

## Services

- Financial Management
- Estate and Legacy Planning Strategies
- Investments
- Insurance
- Tax Planning

## Serving Individuals

We can help take some of the mystery out of preparing for your financial future.

## Business Planning

Special insight and perspective to help business owners pursue their objectives and success.

## Investing Strategy

Applying strategies that are consistent with your goals, but can also keep your investments on track, is essential to the success of your long-term objectives.

Let us provide you with guidance that can help you understand and better define your financial goals.

As a fiduciary under the Investment Advisors Act of 1940, we’re obligated to act in your best interest and provide you with full and fair disclosure of material conflicts of interest.

## Retirement

Where will your retirement money come from? If you’re like most people, qualified-retirement plans, Social Security, and personal savings and investments are expected to play a role. Once you have estimated the amount of money you may need for retirement, a sound approach involves taking a close look at your potential retirement-income sources.

## Estate

Effective estate management enables you to manage your affairs during your lifetime and control the distribution of your wealth after death. An effective estate strategy can spell out your healthcare wishes and ensure that they’re carried out – even if you are unable to communicate. It can even designate someone to manage your financial affairs should you be unable to do so.



## Your Advisor

As your advisor, we'll work with you to determine your goals and risk preferences and then select the appropriate investment strategy for your unique situation.

With strategies ranging from asset allocation and diversification to automatic rebalancing and professional money management, you have a powerful investment resource that strives to meet your needs.

## Fee-based Guidance

By virtue of using the Strategic Wealth Management platform, we can work under a fee-based model. Fee-based asset management allows us to share a common goal with you: to grow the value of your assets. A holistic approach to investing, fee-based asset management ties our compensation directly to the performance of your account. Instead of commissions, we earn an annual fee based on the market value of the account.\* This allows us to concentrate on what matters most – building an investment portfolio that seeks to address your specific needs.

\*The Silverleaf Wealth Management maximum annual fee is 1.5%.

## Investment Management

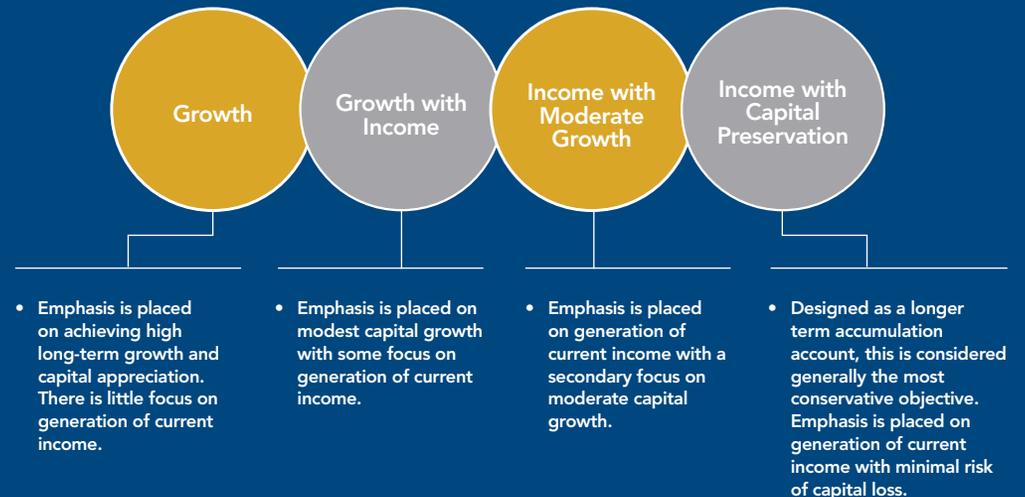
When choosing a portfolio manager, investors have an important decision to make: Do they want a manager who follows a **Passive** approach, investing fixed percentages primarily between stocks, bonds, and cash, or an **Active** manager with the flexibility and latitude to adjust broad allocations between a wide range of asset classes as market and economic conditions change?

At Silverleaf Wealth Management, we have the flexibility in our managed portfolio to seek investment opportunities across a broad spectrum of asset classes and strategies.

### Strategy Selection

Our investment strategies offer investors a stand-alone plan to fulfill a specific objective.

All portfolios are actively managed utilizing the 4-step investment management process outlined below:



### The 4-Step Investment Management Process

- Step 1:** Determine the approximate mix of stocks, bonds, and other asset classes for each portfolio based on current market conditions and our forward-looking assessment of the investment landscape.
- Step 2:** Identify the most effective way to gain exposure to the asset classes we want to own.
- Step 3:** Utilize multiple analytical tools to help optimize our buy/sell decision-making process and to make tactical adjustments to portfolio asset classes.
- Step 4:** Continuously stress-test portfolios against both historical and forward-looking scenarios to assess the risks of major macro-economic or geopolitical events.

## The Value of Asset Allocation

Throughout all cycles of the financial markets, a well-devised and executed asset allocation strategy, tailored to your investment objective, is central to helping you pursue your long-term goals.

## The Benefits of Simplicity

One account. One statement. One fee. Strategic Wealth Management allows you to have all your investments under one roof, making it easy to monitor, manage, and make changes to your portfolio when necessary.

## Review and Manage Your Portfolio

Once your investments are in place, we'll continue to review and manage your portfolio on an ongoing basis. Portfolio rebalancing\*\* is a critical component of the strategic asset allocation process and essential to the long-term success of your portfolio. Rebalancing is designed to ensure that the allocation of your assets remains in line with your stated investment objectives. Because the relative performance of various asset classes will vary, portfolios that aren't reviewed on a regular basis tend to drift from their target allocations.

A portfolio that isn't regularly rebalanced could assume a risk/reward profile that isn't consistent with your investment objectives. Your portfolio will be reviewed on a periodic basis and adjusted when needed to help maintain the optimal allocation of your investments.

## Your Fiduciary Partner

*The ongoing management of your portfolio will include:*

- Regular meetings and discussions so you can feel comfortable with your continued strategy
- Active, ongoing portfolio reviews
- Periodic reexamination of your investment strategy to make sure it continues to stay aligned with your situation and objectives
- Rebalancing decisions\*\*
- Consolidated quarterly performance reports

\*There is no guarantee that a diversified portfolio will enhance overall returns or outperform a nondiversified portfolio. Diversification and asset allocation do not ensure against market risk. No strategy assures success or protects against loss.

\*\*Rebalancing a portfolio may cause investors to incur tax liabilities and/or transaction costs and does not assure a profit or protect against a loss.

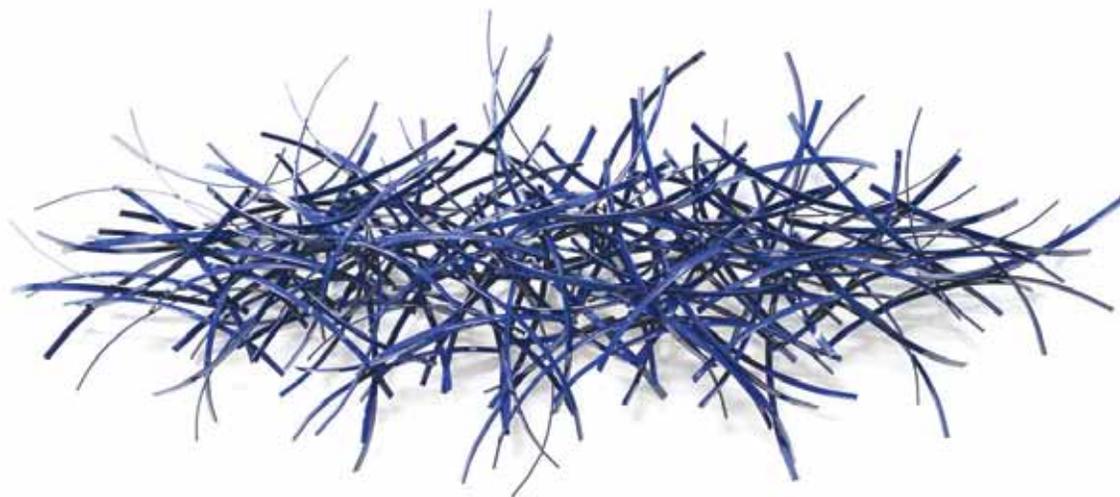


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### Get Started

Let us know if you'd like us to begin building your personal strategy today.

402.934.7200 | [SilverleafWealth.com](https://SilverleafWealth.com)



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