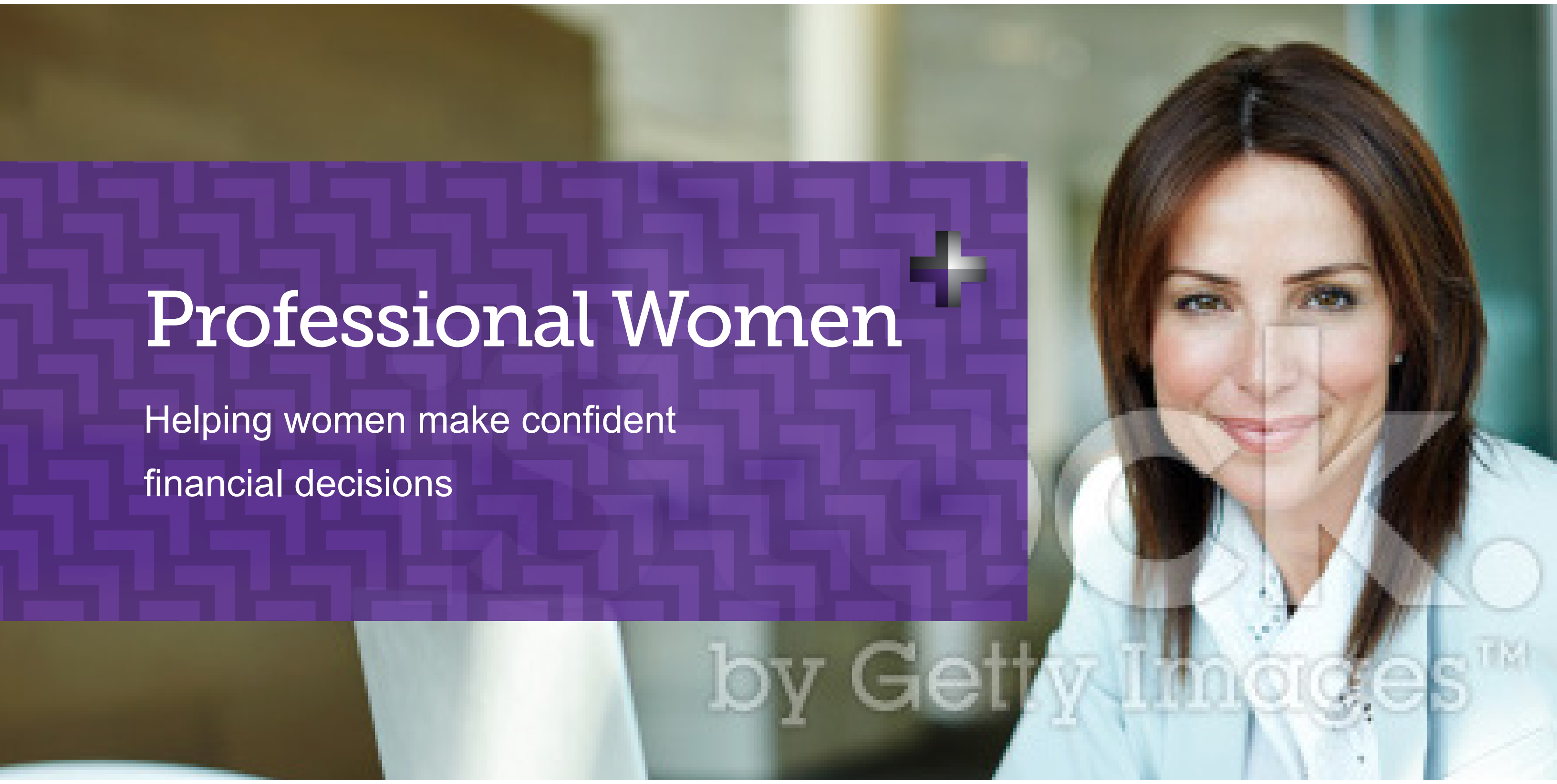
BGM TRUNORTH
WEALTH PARTNERS

Wherever Life and Wealth Intersect



Professional Women

Helping women make confident financial decisions

YOUR SUCCESS, OUR FOCUS

You’re a professional who is thriving in your career. Your success has provided many opportunities, but it also has left you with a question: How do you leverage that success so you can claim freedom in career and life?

BGM TruNorth Wealth Partners understands that, sometimes, as professionals achieve ever more success, they are unsure how to manage the wealth that comes with it. We help you clarify your personal and career objectives and make the financial decisions that best align with your goals. The structure and information we provide can help give you clarity about the many opportunities you’ve worked so hard to attain. The end result? You can feel confident in making decisions about your financial freedom both professionally and personally.

COMMON FINANCIAL CHALLENGES

- How do I leverage my benefits so that they support me now and in the future?
- How can I minimize the taxes I pay?
- If I wanted to take a different position at my company or some time off, could I afford to do so?
- What can I do to protect my retirement plan against market volatility?
- What are the laws affecting me financially if I accept an assignment overseas?
- How do I take advantage of a partnership or if I'm offered stock ownership?

HOW WE HELP

When you become a client, we help you move from a "What if?" mindset of unaligned choices and conflicting goals to an "I know" perspective that provides peace of mind. As part of this process, we work with you to project your cash flow now and in the future. You can think of these projections as the blueprint from which you can make decisions. This blueprint is just one part of the holistic financial planning and investment management that we provide so you can be confident in the decisions you make about your professional and personal life.

As a BGM TruNorth Wealth Partners client, you can enjoy:

- Clarity that your wealth is aligned with your goals
- Confidence that you have the financial flexibility to adapt to changes in your professional and personal life
- A financial advisor with expertise in compensation who will help you make good decisions about your benefits
- A comprehensive inventory of your financial life that pulls together all of its seemingly disparate parts, from expenses to insurance

WHAT YOU RECEIVE

- Review and guidance to keep you on track with your financial plan
- Electronic access to your cash flow blueprint
- Coordination with your accountant, attorney and insurance agent
- Semiannual meetings and more as you like
- Expertise in the needs of high-net-worth C-level executives, business owners and entrepreneurs
- The services of a Registered Investment Advisory firm that receives no commissions and acts in your best interest
- Service that you can take with you should you move for your job
- Quarterly performance reports and market summaries

SERVICES

- Financial planning
- Cash flow projection
- Investment management
- Retirement planning
- Tax planning
- Estate planning
- Education planning
- Pension plan review
- Stock options analysis
- Cross-border or overseas expertise
- Insurance review