Total wealth management.
Optimize your life.

MERCER ADVISORS™

Registered Investment Advisor

Integrated wealth management for an increasingly complex and fast-paced world.

A history of dedication

Mercer Advisors was established in 1985 by Kendrick Mercer, an Oregon lawyer dedicated to improving the lives of his clients both professionally and personally. Originally focused on the complex needs of self-employed dentists, Mercer Advisors developed an in-depth, proactive approach to financial advice, allowing affluent individuals to experience new levels of success. This dedication continues today. More than 3,300 clients rely on Mercer Advisors to help them fund their life goals and support their lifestyle throughout retirement.

Comprehensive life and financial planning

With Mercer Advisors' Economic Freedom® Planning, we work together to develop a "life plan" that integrates your personal life and finances, offering you the greatest opportunity for personal fulfillment and financial success today… and into and throughout your retirement.

Your life plan is more than a retirement plan. It focuses on wealth enhancement with detailed and proactive tax and cash flow planning. It incorporates risk mitigation, legal strategies and insurance strategies in order to safeguard wealth preservation. As well, it includes wealth transfer with an estate planning review and, if applicable, charitable giving.

FIRM OVERVIEW

- Fee-based SEC Registered Investment Advisor
- Core portfolios focus on strategic asset allocation
- More than $3.9 billion in assets under management[1]
- More than 3,300 clients
- National presence with branch offices located in 10 major cities
- Over 40 Certified Financial Planners™, CPAs, attorneys and retirement plan specialists
- Ranked by Investment News[2] as one of the five largest financial planning firms in the U.S.
- Ranked by Investment News[2] and Forbes[2] as one of the largest fee-based Registered Investment Advisors in the U.S.

OUR MISSION

Mercer Advisors is a total wealth management firm that provides comprehensive financial planning and investment management. Dedicated to improving the lives of our clients today and through retirement, we help them to develop a clear vision of their life goals. We then support their journey by providing comprehensive, coordinated wealth management advice that spans all areas of their financial life.

Building and preserving savings through sophisticated investing

Mercer Advisors Investment Portfolios have a proven track record of over 25 years of success stories. We have developed a systematic approach that combines award-winning and academically validated strategies with strategic execution practices in order to increase return, reduce risk and reduce tax exposure within in your portfolio. As a result, our most popular portfolios compete favorably with the S&P 500, even during some of the worst economic environments.

As part of our investment consulting process, you will receive academic investing education, historical portfolio performance analysis, risk evaluations, asset allocation strategies customized for your timeline and risk tolerance, an investment policy statement review and portfolio protection strategies. This comprehensive approach is designed to provide you with a clear understanding of how we will help you to fulfill your goals while remaining aligned with your stated values.

WEALTH SERVICES

- Investment Management
- Financial Planning
- Proactive Tax Planning
- Insurance
- Retirement Plan Design and Administration
- Retirement Distribution Planning

INVESTMENT STRATEGIES

- Asset Optimization® Portfolios
- Tax-Managed Separate Accounts
- Taxable Fixed Income Separate Accounts
- Tax-Free Fixed Income Separate Acounts

INVESTMENT PROGRAM

- Group Advantage® Daily Valuation 401(k) Program

800.898.4642

MERCER ADVISORS™

The foundation of our services is the team of experts who support you.

A multi-disciplinary team approach

When it comes to your financial future, you deserve the best working with you. For this reason, we provide you with direct access to the entire Mercer Advisors team — investment experts, Certified Financial Planners™, CPAs, MBAs, attorneys and retirement solutions specialists — all working together to help you achieve and preserve your financial success.

Each team member is an expert in their field

At Mercer Advisors, we take great pride in the experience, expertise and business acumen of our professional advisors. We hire and retain the very best advisors at each of our regional offices in order to provide you with an unparalleled level of service, guidance and collaborative support.

A single source of consistent advice across disciplines

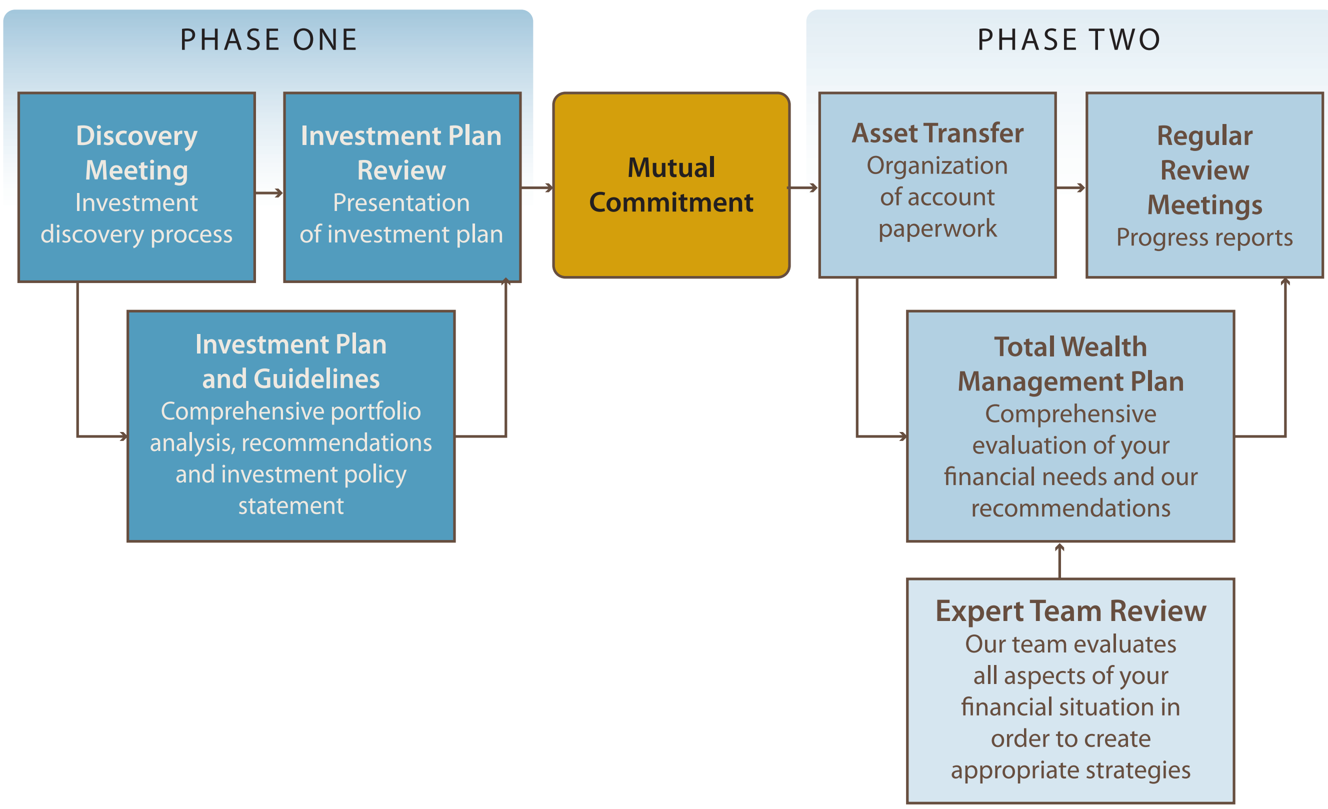
When you use individual resources to manage your life plan, you run the risk of receiving conflicting advice. When you need to make a financial decision and seek advice, each resource will likely focus on their area of expertise, such as your cash flow needs, or your tax needs, or your retirement needs, resulting in greatly varied answers. At Mercer Advisors, we always look at your life plan in its entirety — eliminating the risk of conflicting advice.

Aligned for your success

As a Registered Investment Advisor, we are regulated by the SEC and are held to a fiduciary standard. We must act at all times for your sole benefit and interests. Our interests cannot precede yours. We are not compensated by sales commissions, so our *fee-only investment management services* cannot be swayed by the latest sales pitches from Wall Street, thereby freeing us to act as a true fiduciary. Our success is directly tied to your success. The only way we increase our fee is by increasing the value of your portfolio.

Mercer Advisors' Consulting Process

Our standard consulting process is designed to ensure you receive the in-depth, collaborative and consultative wealth management services that best match your needs.



800.898.4642

MERCER ADVISORS BRANCH LOCATIONS

Atlanta | Boulder | Chicago | Columbus | Detroit
Houston | Philadelphia | Santa Barbara | Scottsdale | Seattle

ATLANTA
5780 Windward Parkway, Suite 275
Alpharetta, Georgia 30005
800.335.8808

BOULDER
2595 Canyon Boulevard, Suite 220
Boulder, Colorado 80302
800.525.0961

CHICAGO
425 N. Martingdale Road, Suite 1220
Schaumburg, Illinois 60173
888.642.3000

COLUMBUS
100 E. Broad Street, Suite 2430
Columbus, Ohio 43215
800.335.1404

DETROIT
39555 Orchard Hill Place, Suite 380
Novi, Michigan 48375
800.444.4143

HOUSTON
4635 SW Freeway West Tower, Suite 550
Houston, Texas 77027
800.825.5152

PHILADELPHIA
300 Conshohocken State Road, Suite 370
West Conshohocken, Pennsylvania 19428
888.642.2329

SANTA BARBARA
1801 E. Cabrillo Boulevard
Santa Barbara, California 93108
877.258.1559

SCOTTSDALE
7221 E. Princess Boulevard
Scottsdale, Arizona 85255
800.898.4642

SEATTLE
12011 NE First Street, Suite 207
Bellevue, Washington 98005
888.642.4636

[1]Data as of May 2011
[2]Mercer Global Advisors Inc. is registered with the Securities and Exchange Commission and delivers all investment-related services. Mercer Advisors Inc. is the parent company of Mercer Global Advisors Inc. and is not involved with investment services. Investment News and Forbes rankings are for Mercer Global Advisors Inc. Rankings are based on assets under management.

7221 East Princess Boulevard | Scottsdale, Arizona 85255 | 800.898.4642 | merceradvisors.com

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