

Financial clarity changes lives. Providing it is our specialty. Wealth Management Consultation



At Mercer Advisors, we believe you deserve a financial and investment plan that offers you the greatest opportunity for personal fulfillment and financial success.

Our Wealth Management Consultation is designed to provide a glimpse into how our team of experts can help you to reach clarity around your finances, investments and other components of your financial life.

Some of the areas in which our experts can provide guidance and clarity include:

- Will your retirement savings and investment plans enable you to maintain your current lifestyle during your retirement years?
- Do you have an investment policy statement? Is it clearly defined and designed to meet your specific needs?
- How much are you able to spend safely and still save adequately for your future needs?
- Is your investment strategy/risk tolerance aligned correctly for your life situation and financial goals?
- Are you able to maximize your savings by leveraging sophisticated tax management strategies?
- Have you taken on unknown or unnecessary risk in an effort to increase your returns or protect your assets?
- Are you strapped by debt and unsure of how to move forward?
- Are you able to fund dreams that you did not think you could afford?

With more than 25 years of experience, our experts are well-equipped to help you navigate the wealth management domain within an increasingly complex and fast-paced world.

Join a Mercer Advisors Certified Financial Planner™ today for a complimentary wealth management consultation.

WHAT TO EXPECT?

The consultation will take place over two one-hour conference calls. On the first call, you will discuss with your planner a series of topics designed to explore and establish context regarding your current financial situation and future goals and expectations. At the end of the call, you and your planner will agree on the date and time for your second call.

Once your planner has completed further analyses, the second call will take place. Together, you will review our findings, have an opportunity to learn more about some of the financial concepts and investment options discussed and explore possible next steps.

HOW TO BEGIN?

Contact your Mercer Advisors representative today to learn more about this exciting opportunity. At absolutely no cost to you, there is no better time to gain greater financial clarity.

ABOUT MERCER ADVISORS

Established in 1985, Mercer Advisors Inc. is a total wealth management firm that provides comprehensive financial planning and investment management, as well as other financial services including proactive tax planning, insurance, retirement plan design and administration.

Kendrick Mercer, the founder of Mercer Advisors, was dedicated to improving the lives of his clients both professionally and personally. This dedication continues today as Mercer Advisors currently helps more than 3,300 clients to fund their life goals and support their lifestyle throughout retirement.

Key Facts¹

- Fee-based SEC Registered Investment Advisor
- Core strategies focus on strategic asset allocation
- More than 40 Certified Financial Planners™, CPAs, attorneys and retirement plan specialists
- More than \$3.9 billion in assets under management
- Over 3,300 clients
- National presence with branch offices located in 11 major cities
- Ranked by Investment News² as one of the five largest financial planning firms in the U.S.
- Ranked by Investment News² and Forbes² as one of the largest Registered Investment Advisors in the U.S.

¹Data as of May 2011

²Mercer 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. Forbes and Investment News rankings are for Mercer Global Advisors Inc. Rankings are based on assets under management.