



## WrapManager is here when you need us

**At WrapManager, we strive to be much more than your financial advisor.** Everything we do stems from our desire to help you envision and achieve your financial goals so you have the peace of mind to enjoy the other important areas of your life. Being here when you need us and doing our utmost to provide the level of service you desire is the WrapManager difference.

### Friendly and Proactive

When you call WrapManager, a member of our knowledgeable Client Service team will be there to assist you and answer your questions or connect you to your individual Wealth Manager, depending on your needs. We work to ensure your questions will be patiently and clearly answered to your satisfaction.

### Comprehensive and Informative

At the start of our relationship, we want to go beyond assessing your current investments. Your Wealth Manager works with you to understand your present family and financial situation and to help establish or adjust your financial goals.

The focus then shifts to the lifestyle you want to enjoy for the long-term. This serves as the foundation of your Investment Plan, acting as the roadmap we follow and adjust together as we work toward achieving your goals. It can help plan for significant purchases, vacation spending, life events and scenarios you want to avoid.

Your Investment Plan, accounts and progress toward your goals can be easily tracked online, at your convenience.

### Adaptive and Disciplined

When your life changes, we are here to listen, understand and make any necessary adjustments to your goals and Investment Plan. In addition to speaking with your Wealth Manager quarterly, we encourage you to consult with them any time you think necessary. Finally, we may suggest changes to your investments based on direction from our Investment Policy Committee.

*It seems the level of communication and personal touch provided by financial advisors has faded away.*

*Our goal is to bring it back.*

Our goal is to provide the exemplary service required to keep you and your family as clients for life. There may be times when you will need a compassionate and empathetic Wealth Manager who will provide more than effective and timely advice.

**That's WrapManager. We look forward to helping you build your legacy.**