SIGNATUREFD

*Financial Design for Life*

EXECUTIVE'S INITIATIVE

# SignatureEXEC

## LIVE FULLY KNOWING YOU HAVE A DEDICATED TEAM

You take care of your company, but are you confident you are doing all you can with your executive benefits and personal wealth to be ready for what's next in life?

As an executive, your business is running your company. At SignatureEXEC, our business is helping you manage your financial affairs. While you focus on your professional and personal responsibilities, we proactively design and help coordinate your finances so you can live the great life you envision.

### SIGNATURE SERVICES & SOLUTIONS

- Planning and goal-setting based on your whole life, not just your balance sheet
- Optimizing your executive compensation through:
  - Stock option maximization strategies
  - Restricted share planning
  - Strategies for selling and exercising shares outside of trading windows
  - Pension plan and cash balance maximization
  - Company stock concentration and diversification strategies
- Collaborating with your CPA on tax minimization strategies
- Designing income generation for whatever comes next in your life

### COMMUNITY SOLUTIONS & STRATEGIC PARTNERS

- Personal development
- Professional development
- Client connections and sharing of ideas
- Executive coaches
- CPAs
- Attorneys
- Executive groups
- SignatureWOMEN initiative
- SignatureGENEROSITY initiative

Successful executives lead complex lives, with many responsibilities and competing demands on their time. Quite often, the demands at work and at home leave little time for yourself, much less for your personal finances and development. It is hard to balance it all. At work, you rely on a team to help get the job done and fulfill your company's vision and goals. It only stands to reason that you need the same kind of teamwork to achieve your personal vision and goals.

## SIGNATUREFD DIFFERENCE

### DEDICATED TEAM FOR EXECUTIVES

Our advisory team has worked with executives at leading public companies for more than a combined three decades. You are fully supported by professionals with deep technical expertise in investments, planning, insurance, taxes and other areas of wealth management.

### DEVOTED TO YOUR SUCCESS

Your SignatureEXEC team has a vested interest in your success—we work for you, not your company. Our team proactively identifies the areas of your life that need attention and works with you to design a plan to help you achieve the results you want.

### DELEGATING THE DETAILS

Advice is useless unless accompanied by action. You can delegate many of the financial details to us so you can seize opportunities for success.

### DISCOVERING CAPACITY

With a well-defined plan and complete confidence in your team, you will rediscover lost capacity, freeing you to focus on what you do best.

### DEVELOPING COMMUNITY

Our SignatureEXEC community connects you with people and resources that offer growth, encouragement and inspiration, moving you toward the great life you envision.

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## WHAT WE DO

Our Wealth Blueprint Process for executives helps simplify your life, save you time, secure your future and reduce your risks. As an executive, you benefit from holistic services and solutions that integrate all aspects of your life with your finances, giving your wealth meaning and purpose. The SignatureEXEC team understands the details of executive compensation and will identify ways to maximize income, strategically position your assets, minimize taxes and protect your wealth. The result is a true blueprint for your finances that helps you achieve your personal and professional goals and live with confidence, fullness and purpose.

## THE CLIENTS WE SERVE

Since opening our doors in 1997, we have worked with executives of public and privately held companies. Our average client has assets of $3 million. Overall, we serve more than 700 clients and have over $2 billion under management.

## MANAGING YOUR PERSONAL WEALTH

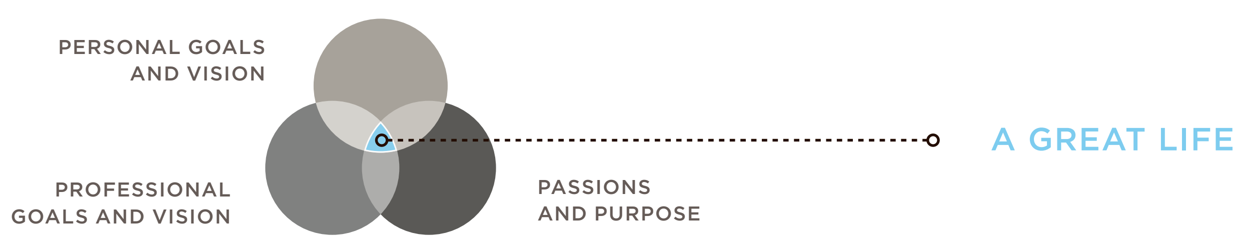
At SignatureFD, we manage your wealth, not just your portfolio. Your entire financial picture is in focus so you are able to live more confidently and fully, using all of your wealth—be it your time, talents, influence, relationships or resources.

## DEVELOPING YOUR PROFESSIONAL WEALTH

The professional capital you have developed over your career may be your single largest asset. We can connect you to strategic partners who will consult with you to prioritize and manage your career so that you are doing what you do best, optimizing your time and your income, focusing on the work you enjoy and achieving the work-life balance you seek. We help you answer questions like:

- What opportunities will develop my skills or give me more fullness and purpose?
- How do I define success beyond my current role?
- What would I do if money was not an issue?
- What will my life look like outside the corporate world?

## CREATING YOUR GREAT LIFE AND LEGACY




We help you leave a mark as unique as your signature, passing on your wisdom, values, traditions, beliefs and memories. You have a choice about how your wealth will affect your family, company, community and society.

When there is an intersection of your personal and professional goals and vision with your passions and purpose, you will discover your great life. If you want to use your wealth to help create and live the life you envision, let's have a conversation.

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