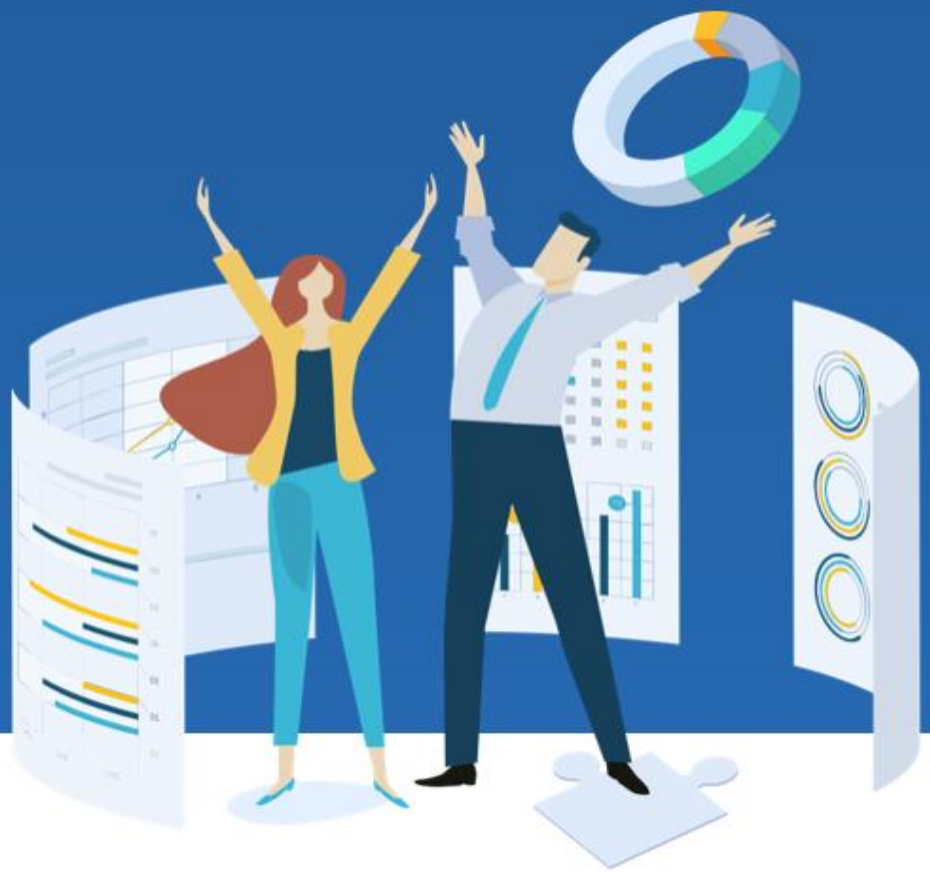
MY FINANCIAL COACH

Wealth Management Solutions for Key Employees



Employer Communication Booklet

Turning Financial Literacy into Workplace Wealth

As your wealth grows, life doesn't get simpler.

It gets more complex. To simplify, ask yourself:

- Is your retirement plan effective?
- Are your workplace benefits coordinated with your personal assets?
- Are your assets in the most productive place?
- Are your trust and estate plans current?

In today's fast-changing financial landscape, you must ensure that your wealth management process is as effective as possible. One way you know—are you meeting your financial goals?

What if you could track all your personal finances in one location, including company benefit plans, with the advantage of an objective Certified Financial Planner™ to coach you?

Introducing

MY FINANCIAL COACH

for Key Employees

My Financial Coach (MFC) gives you an easy-to-use, web-based, comprehensive financial planning and account aggregation platform to work with your Certified Financial Planner™ (CFP®), who educates and coaches you on how to make smart financial decisions.

Your financial coach takes the time to know you well because you're more than a name to us. The professionals behind MFC are experts in corporate benefits. They will teach you how to best utilize your benefits plan in tandem with your personal assets.

More than 9 to 5 It's true. Like you, money never sleeps or takes weekends off. Neither do we. Enjoy the freedom and flexibility to email or call us anytime with questions. Or you can visit our robust "MFC University" knowledge center for self-education and study of specialized content from one of our subject-matter experts.

In Your Sole Interest As a Registered Investment Advisor, MFC holds our team to the fiduciary standard of care: to act solely in your best interest when offering personalized financial advice. What's more, in a collaborative manner, you and your CFP coach develop your complete financial plan in an environment of total transparency.

we do not sell products or services or manage your money.

Merging Benefits and Assets

Our Insight Track™ system gives you a single access point to securely view all your:

- Financial accounts
- Tax and legal documents
- Insurance coverages
- Investments
- Annuities, IRAs, 401(k)s
- Employer compensation and benefit plans
- Stock options, RSUs, restricted shares
- Real estate holdings
- Estate planning
- Wills, trusts, deeds

With this information, our CFP® coach educates you on how to coordinate workplace benefits and personal assets.

1. Every client receives a customized financial plan, balancing personal assets with corporate benefits.

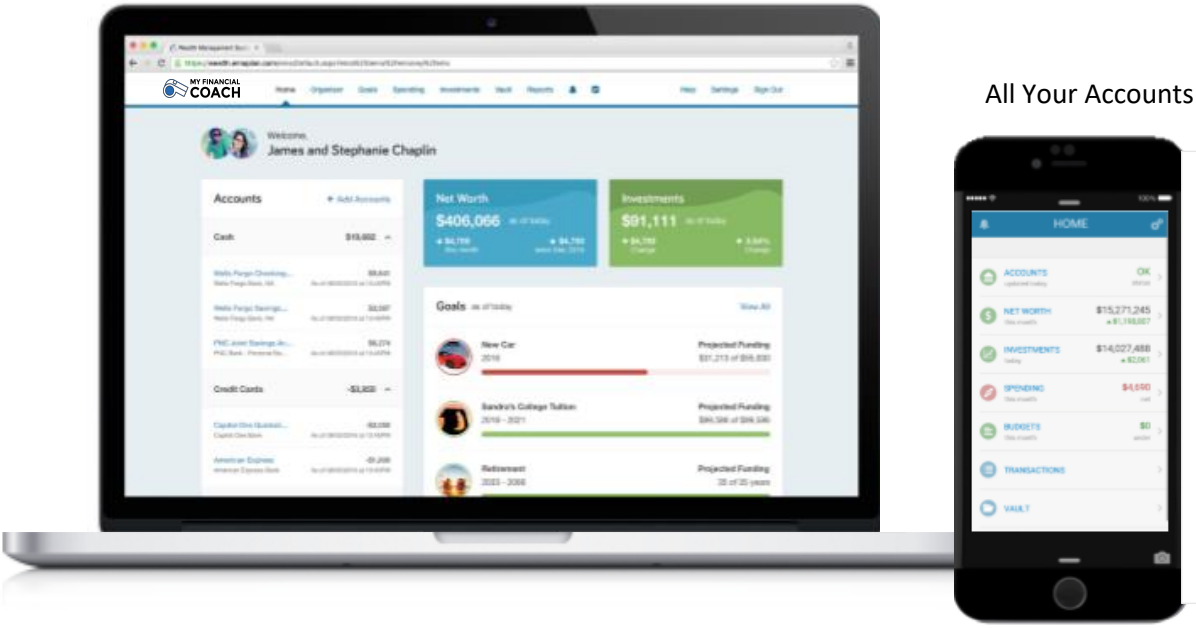
2. MFC brings you the most accurate and actionable advice so you can confidently make decisions that impact your finances and your life.

3. To expand your education, we bring together highly specialized subject-matter experts in areas like wealth management, tax planning, insurance, estate planning, charitable giving, and more to provide best practices expertise to ensure you meet your unique goals and objectives.

Stay up to date with MFC's powerful analytical tools as we continue to track and adjust asset or life changes based on your:

- Overall asset allocation – corporate benefits with personal assets
- Retirement and cash-flow models

Everything in a Single Glance



All Your Accounts on One Page

Evaluate your Assets

Get Updated on Your Investments

Monitor Your Spending

Track Your Progress Towards Your Goals

See Your Transactions

Access Important Documents

- See your whole financial picture on your personal website
- Store all documents in a secure online vault
- Collaborate with your CFP Coach or other advisors remotely

My Financial Coach seeks to fill a portion of the financial literacy gap by offering hands-on, unbiased education at the intersecting points between employee benefits and personal assets— where workplace wealth takes root.

From the Employer's Perspective —

A Corporate-Sponsored Benefit

In today's fiercely competitive market for key talent, you need the right edge to attract, retain, and reward your talent.

As an employer, you've invested heavily in the future of your key talent because you see their value and potential. Take it to the next level by utilizing MFC to ensure your key people realize this value to the fullest extent.

Our sole commitment to educate and empower enables your key people to understand and optimize their employee benefit plans, as well as navigate personal financial decisions. Then, they can spend more time focused on your company objectives.

What's more, by adding MFC as a corporate benefit, your human resources team spends less time and resources answering questions and advising on issues outside of their field of expertise. These issues require professional guidance and a deeper knowledge of an executives' personal financial life.

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Because we separate advice from the implementation of advice, My Financial Coach offers a highly appealing differentiator in the booming advice industry, addressing and eliminating consumer trust issues upfront.

Contact us today to discuss how My Financial Coach will add value to you and your company

www.myfinancialcoach.com
760.340.4277
customerservice@myfinancialcoach.com

With My Financial Coach as a corporate benefit, it's easy for employees to get started.

Power to Personalize Simply complete an online profile and sync your accounts. Then, you'll speak with a CFP-coach-educator who will get to know you, discuss your current situation, and create your personalized financial plan.

Your plan and future updates include actionable steps, like how to allocate your money between personal assets and workplace benefits, and how to best take advantage of your employer's benefits.

Stay on Track Your coach monitors your progress, lets you know when important actions must be taken, and schedules an annual checkup to make sure your plan stays current. Of course, we're always here to help along the way.

For more information on how you can destress your executive team or employee population and add My Financial Coach to your benefits program, please contact:

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