

# Why COMPASS Wealth Management, LLC Is Best Suited To Meet Your Needs

You may be overwhelmed by the alternatives that confront you as you search for an advisor who will meet your needs. You will find that we differ from other advisors on several fronts:

- ◆ **Integrity**—Without integrity there is no trust, which is critical to establishing a successful relationship with an advisor. Our integrity is central to our being—it is a core value. We are committed to act in your best interest.
- ◆ **Independent and Objective**—COMPASS is independently owned and is not bound by any company's products. We recommend whatever is most appropriate for you given your circumstances.
- ◆ **Fee-Only**—Our objectivity carries over to how we charge you for our services. We are fee-only—our compensation is dependent on the value of your investment portfolio so that our interests are aligned with yours. In addition, our fee is inclusive—you do not incur additional fees for any of our services.
- ◆ **Comprehensive, Customized Solutions**—We provide you with the services most commonly demanded by clients, including investment management, retirement planning, education funding, gift and stock option planning, as well as insurance, tax, and estate planning strategies. Our solutions are also customized to meet your specific needs.
- ◆ **Disciplined Process**—We employ a disciplined investment process to avoid the subpar decisions that result when emotions are involved. We establish an appropriate asset allocation mix and diversification strategy and manage your portfolio consistent with the established strategy.
- ◆ **Expertise**—COMPASS was established by Louis E. Conrad II, CFA, who still oversees every client relationship. Lou's background includes managing the Sentinel Small Company Fund, a mutual fund that was cited for its superior performance during his tenure, as well as directing Fidelity Investments' Fund Analysis and Research Group.
- ◆ **Quality Customer Service**—We strive to exceed each client's expectations with superior advice and outstanding service. We want you to feel like you are our only client and we willingly travel to your home or office.