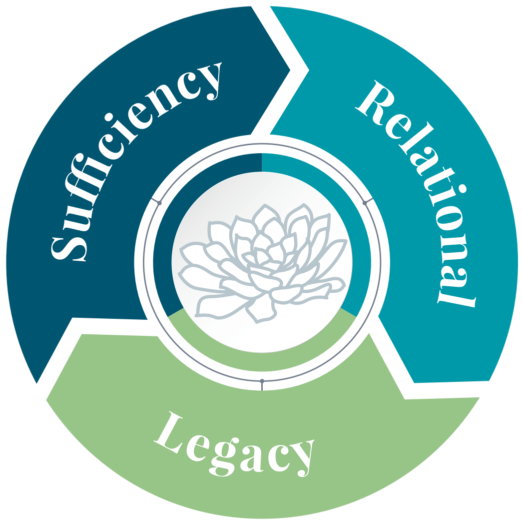
PURPOSEFUL
WEALTH ADVISORS

Planning beyond your net worth.



3-Stages of Financial Planning

As you move through different stages of your life, your relationship and needs for money will also evolve. To best find what you need, what you want and what will be most beneficial, we break it into a 3-part journey:

1. **Sufficiency**
Am I making the right decisions with my money?

2. **Relational**
Are my finances positioned to be aligned with what I want for my family?

3. **Legacy**
What impact do I want my money to have while I am still alive and beyond?

Together we will provide the technical acumen and guidance to change with the state of your finances.

Our Process

Step 1 Where are you now and why?

Step 2 Where do you want to go?

Step 3 Are your financial pieces moving together in the right direction?

Step 4 Roadmap and Implementation

For more information: pwa@keatinginc.com | 773.975.4020 | 2630 W. Bradley Place, Suite C, Chicago, IL 60618

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Planning beyond your net worth.

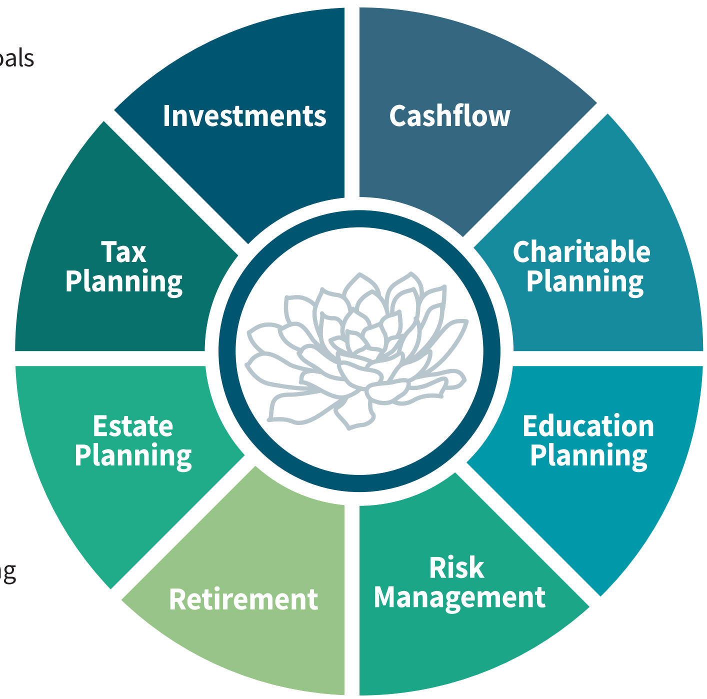
A Global Platform with the High Touch of a Boutique

Investments
- Investment Aligned with Financial Goals
- Due Diligence
- Customized Asset Allocation Implementation

Tax Planning
- Tax Optomized Financial Strategies
- Coordination with Your CPA

Estate Planning
- Advanced Planning Strategies
- Trust Services
- Coordination with Your Attorney

Retirement
- Social Security & Medicare Consulting
- Long Term Financial Projections
- Retirement Income Strategies



Cashflow
- Cashflow Planning
- Debt Management Strategies

Charitable Planning
- Charitable Giving & Gifting Strategies

Education Planning
- Funding Calculations
- Student Loan Strategies

Risk Management
- Asset Protection
- Insurance Planning

Our advisors are registered with Raymond James, which is consistently listed as one of the *top ten largest broker dealers in the United States

Since 1962, Raymond James has been committed to providing investment and financial planning for individuals, families and businesses - a novel approach back then. We believe our clients deserve all the products and services provided by even the largest firms. But with the family feel of a much smaller one.

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*Source - https://www.thinkadvisor.com/2020/05/27/the-2020-broker-dealer-reference-guide-best-in-the-business/