



FINANCIAL SOLUTIONS, INC. PHILOSOPHY

The following points summarize our firm's core beliefs. These provide the basis for our advice to you. All members of the firm are committed to these beliefs. Our success is measured not by performance statistics but rather by our clients' success in achieving their goals.

Goal Setting

We believe that you must set clear goals. Olympic athletes train with an intense sense of purpose. The goal of winning the gold medal motivates and guides them to make dramatic improvements in their abilities. This same sense of purpose can apply to your financial goals. It is our responsibility to educate you in the process and to assist you in defining, quantifying, and prioritizing your goals.

Financial Planning

We believe that planning is integral to your financial health and success. Just as the athlete has a training schedule every week, once your goals are determined, there must be a plan of action to achieve them. We believe in the power of having a definite plan to help you define and achieve your desires.

Communication & Confidentiality

We believe that communication between us is vital to both our success. Financial health is second only to physical health and is a very personal matter. We will often ask that you share information normally reserved only for family. We cannot assist you without knowing the details of your situation. By the same token, confidentiality is one of our highest priorities. We take our role in keeping your information confidential very seriously and have detailed measures in place to protect you.

Investment Policy

We believe that investment success is achieved over time, not overnight. We believe that asset allocation is the single biggest contributor to achieving investment goals. You create your own wealth, it is our responsibility to enhance it, protect it and see that it is passed on according to your desires.

Returns & Benchmarks

While we do evaluate portfolios' total returns and compare money managers to various benchmarks as part of our selection process, we do not put an emphasis on "beating the market". We have yet to have a retired client tell us that their goal is to outperform the S&P 500. We measure success against your personal goals and financial needs. If your goal is to send your child to college in ten years and pay cash, we measure success by mailing the check to the school each semester, not by how much the portfolio made last year.

Trusted Advisor

We believe in the value of having a trusted advisor for all your financial needs. To this end, we not only develop plans and deliver advice, but also act as a personal family office or CFO to oversee all your financial issues. This allows you more time to do the things you enjoy which is the foundation of our mission statement.

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A Registered Investment Advisor