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01

How are we different?

Since 2004, Diversify has been recognized as a leader in the financial services industry. We are different from other investment firms, and those who visit our team will experience what we refer to as *The Diversify Difference*.

From the experience and qualifications of our advisor team, to our caring and diligent client support staff, *The Diversify Difference* is grounded in our brand promise: We are committed to improving the lives of our clients by delivering honest investment and wealth management services that create value through personal relationships, a truly independent approach, and a properly diversified portfolio.

As you seek to navigate the ever-changing complexities of the financial markets, choosing the right financial team is one of the most important decisions you will make in your life. As you make that life changing decision, we encourage you to experience *The Diversify Difference* for yourselves.

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02

What can we do for you?

Diversify offers a comprehensive, full service platform of investments, insurance and wealth management solutions. Our independent model, coupled with our financial advisors' expertise in many different investment and insurance arenas, provides clients with access to a one-stop source of financial advice that is personal, independent and diversified to their particular needs.

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Individual Planning

INVESTMENTS

- | | |
|--|----------------------------------|
| • Stocks and Bonds | • Business Development Companies |
| • Mutual Funds | • Annuities |
| • Indexed and Exchange-Traded Funds | • College Education Funding |
| • Real Estate Investment Trusts (REITs) | • Managed Money |
| • Alternative Investments and Private Equity | • 1031 Exchange Solutions |

RETIREMENT & ESTATE PLANNING

- | | |
|--------------------------------|-----------------------|
| • Wealth Management | • Tax Strategies* |
| • Financial Plans and Analysis | • Charitable Planning |
| • Distribution Strategies | • 401(k) Rollovers |
| • Traditional and Roth IRAs | • Estate Planning |

INSURANCE & ASSET PROTECTION - REQUEST A QUOTE

- | | |
|----------------------|----------------------------|
| • Life Insurance | • Health Insurance |
| • Auto Insurance | • Medicare Insurance |
| • Home Insurance | • Disability Insurance |
| • Umbrella Insurance | • Long-Term Care Insurance |
-

Business Planning

RETIREMENT PLANS

- | | |
|-----------------------|-------------------------------|
| • 401(k) Plans | • Profit-Sharing Plans |
| • Individual(k) Plans | • SEP IRAs |
| • 403(b) Plans | • Simple IRAs |
| • Pension Plans | • Employee Education Programs |

EXECUTIVE & KEY PERSON PLANS

- | | |
|-------------------------------|-----------------------------|
| • Business Continuation Plans | • Buy-Sell Funding |
| • Executive Bonus Plans | • Key Person Protection |
| • Deferred Compensation Plans | • Business Overhead Expense |

INSURANCE PLANS

- | | |
|--------------------------------|----------------------------|
| • Health Insurance | • Long-Term Care Insurance |
| • Business Liability Insurance | • Supplemental Insurance |
| • Group Life Insurance | |
| • Group Disability Insurance | |

* Diversify, Inc. does not provide tax or legal advice, as such advice can only be provided by a qualified tax or legal professional. Diversify seeks to work with tax and legal professionals in developing a tax efficient financial plan.

03

Dave Ramsey

The Diversify team has worked with over 15,000 loyal Dave Ramsey fans over the last 17 years and few firms in the country have more experience working with Dave Ramsey's program. Diversify co-founder Dan Luke started working with Dave Ramsey's team in 2001 and he currently serves as a member of the

advisory council that meets annually in Tennessee at The Ramsey Group headquarters to discuss ways in which SmartVestor Professionals and Endorsed Local Providers (ELP) can better serve Dave Ramsey fans.

For those looking to better understand the Dave Ramsey philosophy, we encourage you to meet with one of our SmartVestor professionals and Endorsed Local Providers.*

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*Dave Ramsey does not endorse investment firms nor the securities offered through DFIG Investments, Inc. Working with a financial professional who is part of the Dave Ramsey SmartVestor program cannot guarantee investment success or that financial goals will be achieved. Financial professionals pay a fee for participation in this program. To the extent that a financial advisor's participation in this program is construed to be a testimonial, please note that it may not be representative of the experience of all our clients, or a guarantee of future performance or success.



04

Getting Started

We're anxious to be of service – below are a few links to get you started

Contact Us

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Sandy, UT 84070

Office: 801.467.5115

Toll Free: 866.467.5115

info@diversify.com

Are you on pace for retirement?

SCHEDULE AN APPOINTMENT

9017 S. Riverside Dr. Ste. 200

Sandy, Utah 84070

Office: 801.467.5115

Toll Free: 866.467.5115

info@diversify.com

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