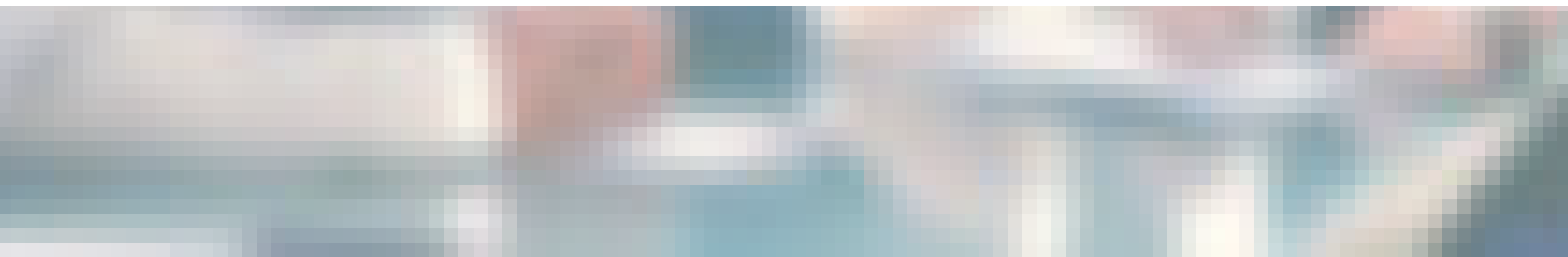


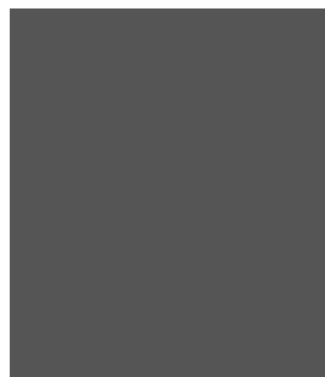
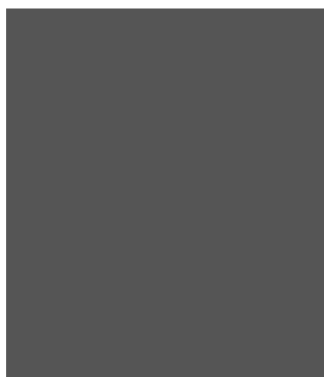
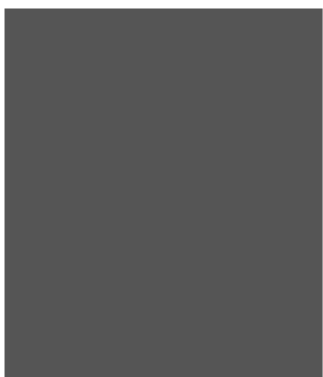


## THE PREMISE



- We work at your direction. You own the client relationship. We will never "go around" you.
- You determine the allocation to Muni Bonds appropriate for your HNW & UHNW clients.
- We implement according to the risk tolerances specific to each of your clients
- We work with accounts greater than \$500,000, *preferably* \$1,000,000
- Our fee is 50 bps annually, paid quarterly in arrears.

- We have a productive working relationship with TD Ameritrade Institutional; however, ultimately, we are "custodian agnostic".
- We hope to provide your clients with a large positive return on the "alpha portion" of their fees
- You will see from our literature, that there are times when we would advocate some investors to lever their accounts. That is your call. We would not introduce a conflict of interest.





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