

## Fiduciary

**Registered investment advisers are held to a fiduciary standard of care.**

By law, they must ensure that investment advice they offer is based in your best interest. In the event that a conflict of interest should arise, investment advisers are required to inform you. Additionally, registered investment advisers are required to have a written code of ethics that governs their actions and sets a standard of business conduct that reflects our fiduciary obligations.

Guided Capital Wealth Management operates under the Registered Investment Adviser, Lifestyle Planning Solutions, LLC. We do not favor one set of investments or products over another when constructing portfolios and providing advice to our clients. We are free to choose the options that best suit our clients. In addition, Guided Capital Wealth Management is not affiliated with any proprietary products.



**Guided Capital Wealth Management was founded on our passion to help individuals and families achieve financial wellness through planning, education and objective advice and guidance. Our mission is to help you organize your finances, define your goals, create a comprehensive plan and measure your progress in helping you achieve long-term financial wellness and living a more productive life.**



## Culture

**Our culture is built on working collaboratively as a team with our clients.**

We listen to what is most important to them – trust, education, knowledge, planning and objective advice and guidance. We believe clients appreciate the time we spend sharing our knowledge and ensuring they fully understand their financial plan and investments.

Our team philosophy is centered around sharing knowledge and best practices while maintaining a culture of mutual respect and accountability. Each team member has an important role in everything we do for our clients. Our ultimate success is determined by each and every client being on track to achieving their desired financial wellness.

## Custody of Assets

Guided Capital Wealth Management and Lifestyle Planning Solutions, LLC, an SEC registered investment adviser, do not custody any client assets. We have chosen TD Ameritrade as custodian of client assets. This means your assets are held in an account with TD Ameritrade, one of the worlds' largest brokerage firms with a commitment to industry-leading technology, excellent client service and account information protection. TD Ameritrade is a member of the Securities Investor Protection Corporation (SIPC).

## Security of Information

Guided Capital Wealth Management takes great pride in making sure all personal information is kept safe and confidential. We utilize data encryption across our technology platform and a secure cloud-based operating system. We are required to share information with our registered investment advisor, Lifestyle Planning Solutions, LLC, an SEC registered investment adviser. We will not share personal information with any other third party unless given the appropriate written consent.

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Investment advice offered through Lifestyle Planning Solutions, LLC, an SEC registered investment adviser. Company information provided pertains to Lifestyle Planning Solutions' dedicated advisory team DBA Guided Capital Wealth Management.