

Regain Control of Your Financial Future with
Experienced, Time-Tested Investment
Management and Financial Planning.
Minimum \$1 Million Investable Assets

Securing Your Retirement Dreams

401(k) and IRA Rollovers,
Maintaining Your Lifestyle, Keeping up with inflation, Estate Planning, Tax Planning, Risk Management

Managing Your Key Life Events

Marriage, Divorce, Loss of a spouse, Inheritance, Real Estate & Asset Sale, Unwinding Concentrated Stock & Stock Options, Loss of a job

Ultra-High Net Worth Strategies

Protection, Protection, Protection, A Word Of Caution, Money, Meaning and Family, Secrets To Success, Transferring Wealth and Prosperity

Turning Business Success into Wealth

Maximizing Your Business EXIT, Business Succession, Protection From Risks, Mergers and Acquisitions, Startup Investment and Exit

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I need help with...

A financial plan that succeeds throughout your life has many parallels with flying. The pilot must make **continual minor adjustments** to ensure an on-time arrival at the final destination. No matter what you know in advance about wind direction, altitude, speed, and heading, you wouldn't make the landing unless the pilot persistently monitored and adjusted the flight path along the way.

Wealth management works the same way.
(<https://pillarwm.com>)

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WEALTH MANAGEMENT, LLC

Your wealth advisor should be proactive, not reactive. By re-running your financial plan on a **quarterly basis instead of just a single time at the inception of the relationship with your advisor**, Pillar Wealth Management is ready to respond and adjust to anticipated and unexpected changes, in and out of your control. Our focus is firmly on helping you achieve all that is important to you for the rest of your life.

Many advisors will create and run a plan and then throw it in a drawer, never to be seen again. Given how quickly life can change, this is a recipe for disaster. Take a minute to think about all the critical aspects of your personal, financial and professional life, and how they evolve over time. They will change even more the closer you get to retirement.

Shouldn't your financial plan be updated regularly to take these changes into account?

The Real Reason Your Financial Plan Matters

Your investments aren't meant to make money just for the sake of making money. Your investments are meant to help you progress toward and achieve all your life and financial goals. To do that requires continual monitoring and updating. Why then do so many advisors and firms run a financial plan **only at the start** and use that to determine the path for the rest of your life? Take a minute to think about what your bank, discount broker, or brokerage firm are actually in business for. Chances are they are in the money management business, or they're selling investment products.

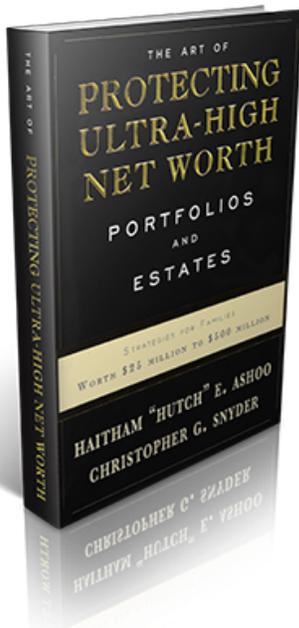
It takes an extra level of care to develop and update financial plans on a quarterly basis. It is easier for a major bank to convince you that *performance* is the primary measure of progress toward your goals, because it would be a lot more

work for them to put forth the ongoing effort it takes to update <https://pillarwm.com> and track your progress towards what matters to you. Do you see the difference?

[Start A Conversation](https://pillarwm.com/the-road/)

Regardless of how impressive the advisor, the firm, or the plan appear, you would be extremely lucky to reach your final destination and life-goals without constantly re-running a financial plan. Just like a pilot who never makes any adjustments in the air. This is how Pillar is different and why we serve you better.

Pillar Wealth Management is an independent wealth management firm serving individuals and families from coast to coast. Pillar's services are best suited for clients with more than \$1 million of investable assets.



The Pillar Wealth Team

Hutch Ashoo and Chris Snyder are co-founders of Pillar Wealth Management, LLC, an independent, fee-based, private wealth management firm. With a combined half a century of wealth management experience, their firm is focused on delivering customized private wealth management advice to high net worth individuals and families as well as privately held company owners. It has been their privilege to work with ultra-high net worth families, some of whom attained wealth reaching \$400 million, helping them achieve a positive change in their lives and finances.

Preparation is how you win the investing war!

You are smart enough to know you cannot know it all, no matter how sophisticated you are about business and financial issues. Besides, you have other things that demand your time and attention. You understand the importance of surrounding yourself with top minds and talent, advisors who can provide good direction in areas where you need expertise.

Lessons from the past

On Black Monday, October 19, 1987, the Dow Jones Industrial Average plunged 23 percent. To this day, this remains the largest one-day loss in U.S. stock market history. We were already managing client portfolios on that fateful Monday, and the crash left a significant impression on us, one that we still carry with us today. Too many investors lost millions of dollars. They vowed not to make the same mistakes again—but in our practice, we still see some of the same mistakes being made.

No one knows when the next financial disaster will happen. If you think back to previous catastrophes, you probably recall the experts saying that this had never happened before, that we were in uncharted waters, and that conditions were different then from what they had ever been before or ever would be

again. We don't buy that line of reasoning. Make no mistake: the surprises will come again, although they will look different. <https://pillarwm.com> [Start A Conversation\(https://pillarwm.com/the-road/\)](https://pillarwm.com/the-road/)

Equally important is the preparation for and proper handling of key life events. Retirement, Death, Money in Motion, and Divorces all present significant financial and personal challenges.

- Do I have enough money to retire comfortably?
- Who will I trust to manage my money now that my spouse has passed away?
- How will I properly invest my large cash inflow from Inheritance, real estate or large stock/options sale?
- How do I financially plan for my children's and grandchildren's educations?
- How will divorce impact my standard of living?

Since no one can predict when the next life or market crisis will occur, your goal should be to protect yourself from such a risk. We provide you strategies you can implement—with your advisors, your portfolios, your estate, and your family itself—that will help to mitigate the next disaster. Among many other matters, we will discuss risk management and asset allocation, which act as an airbag for such recurring yet always-a-surprise events.



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