

# PHILOSOPHY OF SERVICE

As a valued client of Presper Financial Architects, you deserve the highest degree of retirement planning and wealth management services no matter where you are in your journey to retirement. **Our clients receive the following services:**

- 1) Regular investment reviews and planning meetings done on a semi-annual or annual basis, based on the complexity of your situation and your own comfort level.
- 2) Regular market commentaries to keep you up to date with the financial markets and our thoughts and philosophies between client meetings.
- 3) Educational forums exclusive to the clients of Presper Financial Architects, offered periodically.
- 4) Special updates with information that we feel is pertinent to keep you up to date with the latest economic, tax law, and geo-political events that may impact your financial future.
- 5) An accessible service team, with members who answer the phone when you call and will assist with your needs and concerns.
- 6) Client appreciation events where our team members have an opportunity to enjoy getting to know you and your family.
- 7) Worry-free care: we keep a watchful eye on your accounts and assets so you can relax.

We are here for you. Let us know how we can help.



PRESPER  
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