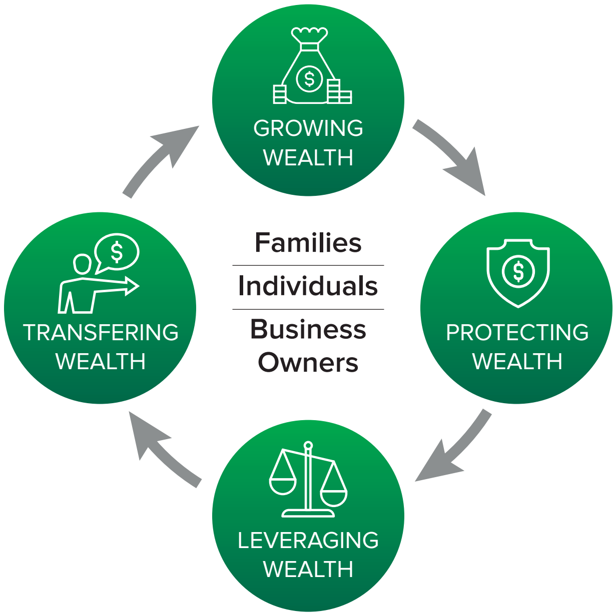
A personal approach to wealth

WADDELL & REED
Financial Advisors®

Solutions for your unique situation

A CUSTOMIZED APPROACH

You've worked hard to build upon your long-term investment strategies – but now you want to look beyond the balance sheet. Your needs have changed, but so has your situation: you're now in a position to leverage your wealth and let your investments work for you.



Why now? Because you're ready for solutions that go beyond basic investment planning, ones that meet the demands of your vision and your desires. Because you expect customized financial tools and dedicated financial professionals who work with you to plan, strategize and determine the best route forward. Because it's time for you to enjoy the life you've earned.

COMPREHENSIVE PLANNING

Utilizing leading-edge technology, your financial professional will use a comprehensive analysis of your financial information to develop sophisticated and personalized strategies designed to help you reach your goals and simplifying the process.

Why do we do this? Because your goals are our responsibility. As such, we strive to be lifelong partners – regularly reviewing and monitoring your progress and taking necessary actions to implement strategies that are in your best interest– and to help you pursue your financial aspirations as they grow, change and evolve.

PROTECTING WEALTH:

Maintain the affluence you worked hard to achieve

Whether you're a family business owner, a successful entrepreneur, or a seasoned executive, you deserve the ability to sustain and protect your wealth through life's journey. You need services that are designed to help grow and preserve your assets through a variety of specialized options, including:

- An investment plan focused on managing volatility and risk
- Fixed-income investments
- Income planning
- Tax-managed investment products and planning solutions
- Wealth preservation products

LEVERAGING WEALTH:

Maximize your wealth while maintaining your plan

Opportunity will knock frequently along your journey – and now that you're in a position to leverage your wealth you can seize those opportunities without sacrifice. Whether you have a business liquidity need, want to purchase a second home, or require short-term financing, you can use your wealth to your advantage without disrupting your existing financial plan. Solutions that may help you leverage your portfolio include:

- Private banking
    - Lending and liquidity solutions
    - Mortgage solutions
- Securities-based lending

TRANSFERRING WEALTH:

Leave a well-earned legacy

Whether creating a legacy for the next generations of your family or leaving an impact through philanthropic giving, your wealth and your vision for the future are tied together. Should your family be a part of the conversation, we help them understand your vision, ensuring that they can develop an appreciation for what you want your legacy to be. Wealth transfer and philanthropic planning solutions include:

- Trust services
- Donor advised funds
- Charitable trust administration

Why Waddell & Reed?

Since opening our doors in 1937, our approach has remained decidedly simple, genuine and straightforward: know our clients well, treat them with respect and measure our success by their success. This deeply personal approach is the reason Waddell & Reed advisors and their clients typically enjoy long-lasting relationships.

We take your journey seriously, and will be there every step of the way, listening, planning and advising.

LISTENING.

To us, success demands not only a deep understanding of your objectives, but your needs, values, time horizon, risk tolerance and expectations.

PLANNING.

By building personalized plans supported with highly competitive investment products and dedicated service, we enable you to not only identify goals, but take consistent action toward achieving them.

ADVISING.

Our mission, every day, is to help you at all stages and through the changes that life may bring.

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