

ENGAGING WITH BUTTONWOOD

INITIAL STRATEGY

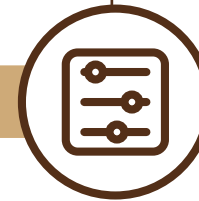
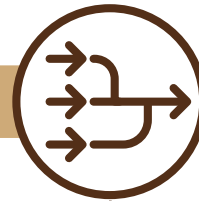
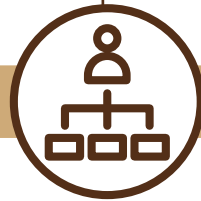
We've met and discussed the details unique to your life. Now, it is time to define and prioritize your initial strategy.

ORGANIZATION

With accounts connected through our industry leading technology, you now have 24/7 access to your financial life. It provides a true sense of accomplishment to know where all your financial assets are and how they are working together.

DIRECTION

Through ongoing proactive engagement, together, we will monitor and revise strategy as you and your family move through life's transitions. Our services provide peace of mind: Your financial life is moving in the right direction; even when life throws the occasional curveball.



IMPLEMENTATION

Our Team will complete the necessary paperwork, coordinate signatures with you and connect your accounts to our technology platforms. At this phase, expect communication from both our Advisory & Operations Teams as we begin to execute strategy.

SIMPLIFICATION

With your financial foundation in place, your Family CFO Team is simplifying your life. We are streamlining cash flows, managing investments and coordinating strategies for tax, insurance and your estate plan.