

CONTACTS

Steven P. Barth, CFA, CPA
Partner & Chief Investment Officer
678.302.1436
sbarth@btwealthllc.com

Jeff Call, CPA, PFS, CFP®
Partner
678.302.1456
jcall@btwealthllc.com

Ken Thrasher, CPA, PFS
Partner
678.302.1455
kthrasher@btwealthllc.com

Gary Weld, CPA
Partner
678.302.1482
gweld@btwealthllc.com

WHO WE ARE

BT Wealth Management offers independent, fee-only investment management through experienced and credentialed investment experts. Our seasoned associates maintain their professional status as CPAs, Chartered Financial Analysts, Certified Financial Planners™ and Personal Financial Specialists in order to provide the most knowledgeable and up-to-date counsel possible. In addition, our fee-only status ensures that we provide objective advice offered in the best interests of our clients.

WHAT WE DO

Our team employs an integrated comprehensive approach to wealth management that works in concert with your other advisors to recommend, implement and monitor your investment plan. Understanding your objectives and tolerance for risk, we also leverage the professional knowledge of other Bennett Thrasher associates in tax planning, personal financial services, and business valuation, to address all aspects of wealth management beyond the management of liquid assets.

Throughout, we provide a high level of personal service that provides peace of mind and allows you to focus on your business and other personal interests.

It is our independent, integrated comprehensive approach that sets us apart.

Continued on back

WEALTH MANAGEMENT *(continued)*

Our unbiased BT Wealth Management services include the following:

- Investment management
- Asset allocation
- Risk tolerance optimization strategies
- Tax efficient solutions
- Integrated wealth management

HOW WE MANAGE YOUR ENGAGEMENT

We initiate the relationship by spending sufficient time with you to completely understand your personal financial and tax situation and investment objectives. From this analysis and subsequent discussions, our team prepares portfolio recommendations based on your goals and objectives and personal tolerance for risk. Once you endorse the plan, we implement the strategy using our proprietary open architecture platform and continue to monitor your portfolio in conjunction with your objectives. Our open architecture platform allows us to objectively select the most attractive investment managers and funds within each asset class without being tied to a particular platform or set of managers. Our goal is to earn attractive returns commensurate with each individual client's risk assessment. As the year progresses, we keep you apprised of your investments through quarterly reports, meetings and other consultations. Of course, our investment team is available at any time to answer questions, explore additional opportunities or respond to changes in the markets.

THE VALUE YOU RECEIVE

Our objective fee-only advisory status ensures that you receive our best advice and recommendations with no conflicts of interest. That translates into a comfort level and peace of mind that clients truly value. In addition, our broad firm experience contributes intelligence and knowledge on the range of financial issues and opportunities resulting in a more comprehensive approach to wealth management.

Experience **Better Together**.