MAGII Wealth Management

Second Opinion Service

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Exclusively for friends, family and associates of our valued clients

In this challenging economy, you probably know a friend, family member or colleague who may be in a complex situation or just unhappy with the advice from his or her financial advisor—it's not uncommon. *Studies have shown that more than 80 percent of high-net worth investors would value a second opinion on their finances.*[*]

In order to help the people you care about achieve their financial goals, we have created a complimentary second-opinion service. We're pleased to offer your friends, family members, and associates the same knowledge and guidance that you have come to expect as a valued client of MAGII Wealth Management.

Working with a team that redefines wealth management

Ask ten investors to define wealth management. Actually, ask ten "wealth managers" to do so. You will almost certainly get ten different answers, with most heavily focused on investing. As a client of MAGII Wealth Management however, you benefit from a cutting-edge team that has a clear and comprehensive vision of wealth management.

MAGII Wealth Management

Investment Consulting	+	Advanced Planning	+	Relationship Management
• Asset allocation • Portfolio management • Manager due diligence • Risk evaluation • Performance analysis		• Wealth enhancement, including cash flow, tax minimization and liability management • Wealth transfer • Wealth preservation • Charitable giving		• Regularly scheduled calls, reviews and in-person meetings • Team of professionals, including legal, tax, insurance and investment advisors

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* Robert Frank September 30, 2008 WSJ Blog: available from: http://blogs.wsj.com/wealth/2008/09/30/wealthy-investors-stage-revolt-against-advisors/

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Our consultative process

We approach each new engagement with a time-tested consultative process. This allows us to have an open dialogue in which we learn about every client's values and goals while working with them to tailor a plan to help achieve them. As a valued client, you will recognize the five steps below as the process you have experienced with us. Through our second-opinion service, your friends, family members and associates can enjoy a portion of this experience at no cost.

Full client experience

Discovery Meeting → Investment Plan Meeting → Mutual Commitment Meeting → 45-Day Follow-up Meeting → Regular Progress Meetings

What to expect from our second-opinion service

We will meet with your friends, family members and associates for a Discovery Meeting. Assuming that we both agree that we have a basis for working together, they will return for the Investment Plan Meeting. Hopefully, we can confirm they are on track to fulfill their values and achieve their goals with their current financial provider. If needed, we will suggest ways in which we can help, including recommending another provider if we are not a good fit for their needs. Either way, they'll receive a Total Client Profile and a personalized analysis of their current situation—a value in excess of $5,000.

Second-opinion service

Discovery Meeting → Investment Plan Meeting

Let us help you help those you care about. Contact us today.

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