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INVESTOR PRODUCTS & SERVICES AVAILABLE THROUGH D.A. DAVIDSON

- Financial Planning
- OTC and Listed Securities
- Government Securities
- Municipal Bonds
- Corporate Bonds
- Insured Brokered Certificates of Deposit
- Money Market Funds
- Mutual Funds
- Corporate & Public Finance
- IRAs, Retirement & Pension Plan Services
- Insurance and Annuities
- Managed Assets Programs
- Trust and Estate Planning
- College Planning
- In-House Research
- DADVANTAGE Complete Cash Management
- Prestige Account Benefits
- Loans on Securities

Forbes Financial Advisor Group Wealth Management Process

Discovery Meeting

We begin by getting to you know you so we can design and implement an investment strategy that caters to your specific and personal financial needs. We ask questions to gather insight into your family, financial history and future goals, risk tolerance, time frame, and overall financial objectives. Our job is to share with you how we operate so that you can assess if we will be a good fit for meeting your needs.

Investment Plan

We work closely with you to construct a customized investment profile by extensively reviewing your current financial situation and analyzing your portfolio. From there, we prepare and implement an individualized investment plan designed for your specific objectives. Our personalized asset allocation strategy is the foundation of your plan.

Wealth Management

We may find that you have additional wealth planning needs. Through us you not only have our experience and dedication working for you, but you also have access to all the resources available at D.A. Davidson. We invite you to take advantage of our full spectrum of services: estate planning, charitable gifting, education planning, business succession planning and more.

Communication Plan

We regularly monitor, re-evaluate and update your investment plan to make sure we're on track in meeting your needs. We will schedule a consistent and systematic plan of communication with periodic personal meetings, phone conversations or email updates, depending on what was agreed upon in the initial discovery meeting. It is important we remain current on changes both in your life and the economic environment that may affect your investment plan.

FORBES FINANCIAL ADVISOR GROUP
Advisors with D.A. Davidson & Co. member SIPC

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