

ANNEX WEALTH MANAGEMENT

# Comprehensive Financial & Investment Planning



**ANNEX**  
WEALTH MANAGEMENT  
Know The Difference™

[annexwealth.com](http://annexwealth.com)



# What We Do

## HOLISTIC WEALTH MANAGEMENT

We provide proactive financial and investment planning that meets you where you are, considering your goals, vision for retirement, tax situation, risk management needs, and your estate planning objectives. The Annex planning process helps build one holistic financial plan that directly supports the pursuit of your financial goals. As a fee-only fiduciary, we always act as a fiduciary on your behalf. We provide a comprehensive list of services and a clear, easy to understand fee, so you understand how we work for you.

## CUSTOMIZED FINANCIAL PLANNING

Build confidence as we construct your plan with our team-oriented approach, supported by our deep bench of in-house, experienced professionals across the disciplines of wealth management. We understand that nearly everyone has unique circumstances that may impact your specific goals and planning. The holistic planning we do for you is a dynamic, on-going process that identifies planning opportunities and addresses changes throughout your financial journey. Your plan will provide long-range projections, allow us to build-in “what if” scenarios, and rigorously test it across hundreds of possible outcomes.

## ACTIVE & DIVERSIFIED INVESTMENT MANAGEMENT

Our credentialed and experienced team of in-house investment professionals manages disciplined, globally diversified portfolios in accordance with your plan and financial goals. We construct your portfolio using forward-looking asset allocation guidelines and employ active, tactical investment strategies around the core. We employ a research driven investment process. We seek to balance risks, identify opportunities and account for changes in economic and market cycles.

## DEDICATED WEALTH MANAGEMENT TEAM

Your Annex Wealth Manager is a dedicated strategist responsible for coordinating our team of planning subject matter experts to construct, implement, and monitor your plan. You and your Wealth Manager will work together to identify planning opportunities and discuss strategies to close any gaps. We'll conduct regular strategy planning meetings with you to ensure your plan supports the pursuit of your financial goals. Through your time as our client, we'll update and make adjustments to your dynamic plan as your life circumstances evolve.



# THE ANNEX CLIENT JOURNEY

*Comprehensive and Holistic Wealth Planning*

## Initial Meeting *Getting To Know You*

- Explore and understand your situation, goals, and relationship expectations for a wealth management partner
- Review your documents that show where you are now
- Discuss how the Annex difference supports the pursuit of your financial goals throughout your life



## Initial Meeting Follow up *Setting Next Steps*

- Confirm our next meeting
- Recap what we heard and our discussion
- Identify and request any missing financial documents



## Setting The Course *Your Financial and Investment Plan*

- Present and discuss your customized, holistic framework for a financial and investment plan designed by the Annex interdisciplinary team
- Identify planning opportunities and talk about proposed strategies to address any gaps
- Connect the plan to support the pursuit of your financial goals
- Address your questions and proceed to next steps



## Partnership *Welcoming You as a New Client*

- You'll sign new client documents including your tailored Investment Policy Statement
- We'll open your accounts, facilitate and track transfer of assets, and update you on the status
- Confirm you're set to implement the plan we've designed and discussed



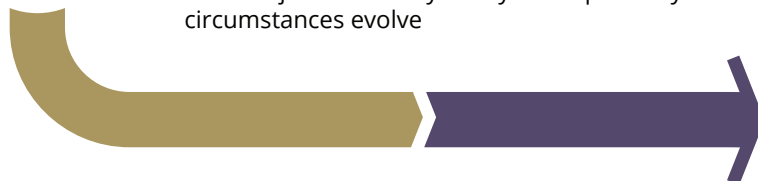
## First Client Meeting *Review and Confirm*

- Normally set within the first 30-60 days
- View your new accounts, re-confirm goals, and address questions
- We'll set up our next meeting and topics for discussion



## On-Going Strategy Meetings *Collaborative Discussions*

- Update and review how your plan is tracking toward your financial goals
- Present and discuss relevant financial and investment planning opportunities and recommended strategies
- Make adjustments to your dynamic plan as your life circumstances evolve



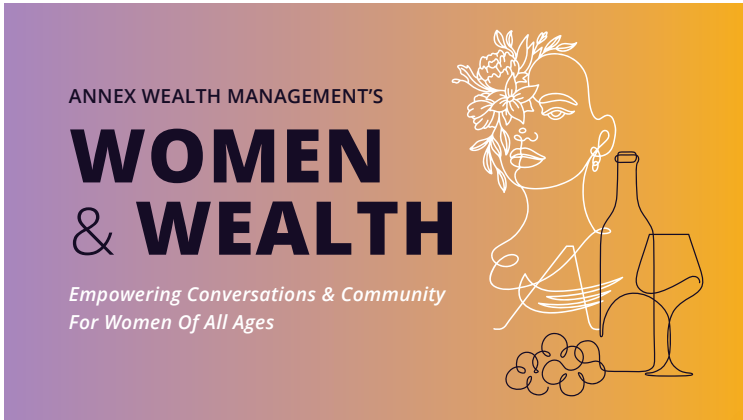


## MACRO & MARKET MUSINGS

Weekly analytical commentary on key macroeconomic indicators, accompanied by forward-looking perspectives to help investors navigate the financial landscape.

## QUARTERLY OUTLOOKS

Every quarter, we publish a timely investment or planning recap and outlook, filled with key data and critical insights.



## EVENTS

Throughout the year, we exhibit our dedication to engaging education through our many in-person and virtual events on a wide array of wealth planning topics.

## INSIGHTS

Our in-house team often shares expertise and insights that help you understand the markets, economy, and your plan.

## Tax Changes After Passing Of The One Big Beautiful Bill

WHITE PAPER  
JULY 2025

