



WEALTH WATCH

ADVISORS



WEALTH WATCH Advisors

At Wealth Watch Advisors, our commitment is to design, implement, and monitor financial strategies customized to meet the specific goals of our clients. Our unique solutions have either a passive or tactical approach to investing, with a possible combination of both methodologies,

depending upon your time horizon and risk tolerance. Through customized strategies and a focus on consistent client/advisor communications, our goal is to help clients overcome many of the potential investment obstacles and guide them to and through a successful retirement.

OUR Process

Although each of our clients have specific needs requiring unique solutions, our approach to developing a sound plan is the same.

1 **Communication**

Our advisors begin new relationships by first understanding the concerns, objectives and goals of each client. Once a plan is implemented, they employ cutting edge technology solutions to help keep clients informed on how their investments are performing. Through the use of these tools and regular strategy sessions, our goal is to keep the lines of communication open and focused on investment success.

2 Identify and Understand

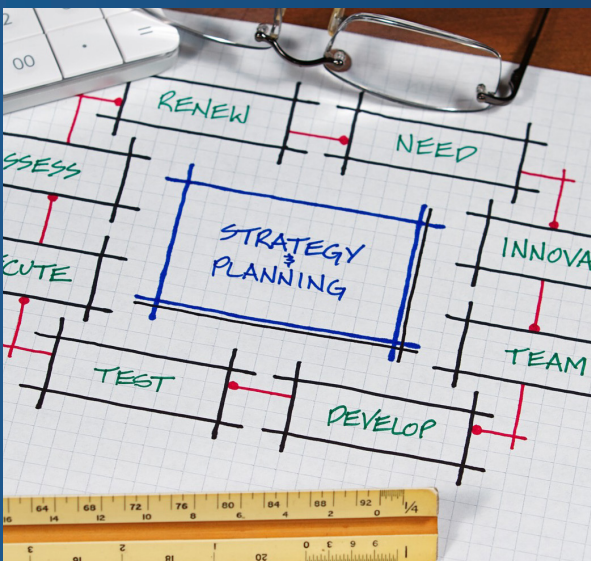
By asking questions and listening to client concerns, our advisors try to identify and understand what is important to you. Part of this process includes gathering the information necessary to design a plan by utilizing the LifeArcPlan™ Personal Information Survey. This software allows us to securely collect and archive your responses to questions designed to identify personal goals, concerns, expectations, timelines and finances throughout your pre-retirement, retirement and distribution phases.

3 Assess and Analyze

Our advisors use a consultative approach to financial planning. This is accomplished through a multi-disciplinary approach, consisting of legal, tax, investment, insurance and financial planning, all working together for your best interest. Our goal is to identify the interdependency of each “piece of the puzzle,” and how it works with or impacts the other aspects of your overall plan.



4



Design the Plan

Each plan is customized to address your current and future financial goals. As well as distributions in retirement. We believe in creating a “Retirement Pro Forma” to identify what is needed to fund the annual distributions during your retirement. Our advisors are equipped to design plans to achieve short, mid, and long-term investment objectives.



5 Implement Unified Solutions

Wealth Watch Advisors utilize both traditional and alternative strategies to help you fulfill your financial goals. This may include the use of managed portfolio accounts, insurance contracts and cash equivalents. We offer both passive and tactical investment strategies to grow and protect your assets, while always attempting to mitigate downside risk. If necessary, our advisors may suggest the use of insurance contracts to overcome potential hazards such as sequence of returns risk, and/or longevity challenges such as long-term care, cost of living increases, rising health care costs and taxes.



6 Monitor & Adjust

Implementing a financial plan is not a static event and continual monitoring is crucial. Our advisors will meet with you on a regular basis to ensure that your plan is staying on course, and make any necessary adjustments. Your success is our success.

INVESTMENT Partners

Wealth Watch Advisors is proud to work with some of our country's leading investment managers. In addition to assessing our money manager's historical performance, we also ensure that their overall money management philosophy aligns with ours. Our philosophy incorporates an emphasis on risk mitigation. As such, many of our investment managers utilize their own proprietary algorithm systems to assist in making decisions about when to be in or out of the market. Collectively these firms manage over 100 billion dollars in assets.



Howard Capital Management, Inc. investment strategies are designed to protect capital in market downturns while seeking to outperform the major indices during market upswings using a combination of strategic and tactical approaches. The HCM-BuyLine® is used to make the strategic decision whether or not to be in the stock market, telling clients when and how much to invest in equities.



Taiber Kosmala & Associates, LLC brings a substantial amount of experience across a wide variety of clients including retirement plan sponsors, non-profits, financial institutions, and affluent families. Their national client base represents well over \$6 billion in assets under advisement and have, in several instances, over 10 years of history with the firm's professionals.



Horizon Investments' mission is to provide goals-based investment management strategies that empower financial advisors to help their clients achieve their most important financial objectives throughout life.



Brookmont Capital Management specializes in dividend equity portfolios that include Separately Managed Accounts and direct client relationships. They utilize a top-down investment process because they believe proper investing begins with an understanding of the current economic and market cycles. Their macroeconomic outlook is the primary factor in determining the firm's asset allocation models, sector weightings, and attractive market sectors.



Guggenheim Investments focuses on the return and risk needs of insurance companies, corporate and public pension funds, sovereign wealth funds, endowments and foundations, wealth managers and high net worth investors.



First Trust Portfolios L.P. and its affiliate First Trust Advisors L.P. (collectively "First Trust") were established in 1991 with a mission to offer trusted investment products and advisory services. They are inspired every day by how financial advisors and their customers use their products and services to define goals, solve problems and develop long-term strategies.

WEALTH WATCH Technology

Wealth Watch Advisors provides clients with leading technology to monitor portfolio performance and manage downside risk. From our mobile app, clients can quickly and easily access their account information 24/7 from any electronic device.



App Features:

- Portfolio Values
- Holdings Summary
- Performance Reporting
- Monthly Orion Statements
- News & Market Commentary
- Advisor Contact Information

SPEAK WITH A WEALTH WATCH ADVISORS Professional today!

Wealth Watch Advisors is headquartered in Englewood, CO. At Wealth Watch Advisors we support IAR's (Investment Advisory Representatives) and RIA (Registered Investment Advisory) firms nationwide. Contact us today to speak to a Wealth Watch professional near you.





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