Strategic Wealth
PARTNERS

INDEPENDENT WEALTH MANAGEMENT

Managing complexity, delivering simplicity.

stratwealth.com

Our Story

Strategic Wealth Partners ("SWP") is an independently managed wealth management firm that has been partnering with clients since 2008. We created SWP because we saw an opportunity to provide more personalized solutions to clients in an environment that put their interests first.

What does the fiduciary standard mean to you?

Our fiduciary duty is at the core of SWP — the legal and ethical obligation to put your interests ahead of our own at all times. Our fee structure also aligns with your best interests. As a fee-only firm, we are paid directly by our clients and don't receive commissions or other financial incentives for our work.

Strategic

We work proactively to identify and implement actions that will enhance your financial well-being.

Wealth

We help you manage, protect, and enjoy the resources that you have worked hard to acquire.

Partners

We work in a collaborative environment that draws upon multiple skillsets to help you achieve your goals.

Financial Planning

Financial planning is the process of creating a roadmap toward your long-term goals while managing your priorities, needs, and opportunities along the way. For us, financial planning is more than the creation of a document; it's an ongoing and evolving process that is customized for you. Fundamentally, we believe that your financial plan should drive your investment decisions.

Our work begins by asking questions, such as: What milestones are on your horizon? What are your short-term objectives? What are your long-term goals? What does a meaningful legacy look like to you?

Once we learn more about you, our planning process covers the six key pieces of your financial life.

1. **Cash Flow Planning**
2. **Investment Planning**
3. **Retirement Planning**
4. **Tax Planning**
5. **Estate planning**
6. **Insurance Planning**

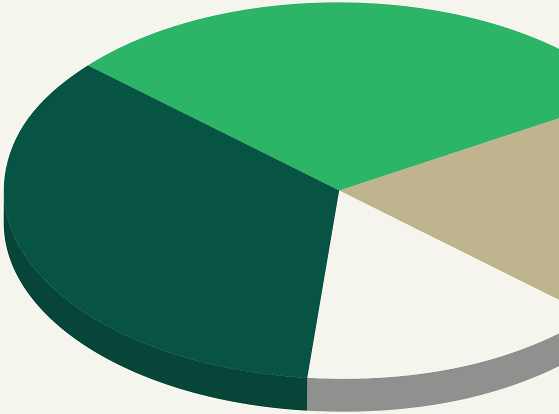
Investment Management

We invest our time and energy into developing the right portfolio for your short-term objectives, long-term goals, and risk tolerance. Our approach is rooted in the belief that asset allocation is an important determinant of investment success over the long run. For this reason, we don’t view “market timing” as a viable strategy, and we rarely recommend individual stocks or bonds.

We are a fee-only advisory firm, meaning that we are paid by clients directly. We do not receive commissions or other financial incentives for the investment advisory services that we provide, and we don’t have any "in-house" products that can create conflicts of interest between an advisor and their clients.

This model allows our team to provide advice that is unbiased, objective, and driven by your goals.

Asset allocation to prudently grow your wealth



Who We Serve

Our work on behalf of clients is far-reaching, but it all comes down to managing complexity, delivering simplicity, and helping people reach their goals. Over the years, we've found that our team is especially well suited at serving eight distinct types of clientele, shown below. If one of these sounds like you, it's likely that our team would be a good fit to support your financial objectives.

- Retirees
- Professionals
- Multi-Generational Families
- Business Owners
- Surviving Spouses & Divorcees
- LGBTQ+
- Corporate Executives
- Retirement Plan Sponsors

Your Trusted Advisors for Life

What can you expect when working with SWP? The answer is in our name: you can expect a partner who understands your life and the financial complexities that come with it. This level of understanding allows us to serve as trusted advisors for life, helping you manage every financial decision you will face.

In any partnership, good communication is critical for success. As we begin our work together, this communication starts with our team asking a lot of questions and doing a lot of listening. Through this process, we get to know you, your life, your priorities, and your goals — all information that serves as the foundation of our relationship moving forward.

As we begin working together, we tailor the experience to your unique goals, discuss what options exist, and look for other ways to support your financial wellbeing.

Service Meets Scale

Over the years, we've built an operational platform that includes many names you are probably already familiar with: Fidelity, Charles Schwab, and eMoney, to name a few. As an independently managed wealth management firm, we have the power to pick and choose the platforms and technologies that we leverage, helping us remain at the cutting edge when it comes to research, financial planning, and investment management.

Significantly, our relationship with Focus Financial Partners allows us to compete with any wealth management firm – large or small. Focus is a leading partnership of independent, fiduciary wealth management firms that provides superior access to best practices, resources, and continuity planning for partner firms.

This means that when you work with our team, you tap into a vast network of knowledge, skills, and experience that can help you navigate unique planning and investment challenges.

FOCUS®
FINANCIAL PARTNERS

Fidelity INVESTMENTS

charles SCHWAB

MORNINGSTAR®

eMoney

ADDEPAR

holistiplan

We look forward to hearing from you.

Connect with our team in Deerfield or Milwaukee,
or visit us online to get the conversation started.

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Investing in alternative assets involves higher risks than traditional investments and is suitable only for sophisticated investors. Alternative investments involve greater risks than traditional investments and are not suitable for a large portion of an investor's portfolio. Alternative investments are often less liquid and therefore should not be used in portfolios that require near-term liquidity. An investor should consult with his/her tax advisor prior to investing. Alternative investments typically have higher fees than traditional investments.

In addition to our Management Fee, you may also incur certain charges imposed by unaffiliated third parties. Such charges may include, but are not limited to, fees charged by External Manager(s), custodial fees, brokerage commissions, transaction fees, charges imposed directly by a mutual fund, index fund, or exchange traded fund purchased for the Account which shall be disclosed in the fund's prospectus (e.g., fund management fees and other fund expenses), fees imposed by variable annuity providers and disclosed in the annuity contract, certain deferred sales charges, odd-lot differentials, transfer taxes, wire transfer and electronic fund fees, and other fees and taxes on brokerage accounts and securities transactions.

Brokerage commissions and/or transaction fees charged by broker/dealers are exclusive of and in addition to our Management fee. External Managers may purchase or sell securities through a broker/dealer other than the Custodian(s) (trade away). Managers of Fixed Income Securities, which are traded exclusively through dealers, may trade away on a frequent basis. Your account may incur higher transaction costs for securities traded away than those traded through the Custodian(s). Please read the disclosure brochure for each External Manager carefully.

Investment performance results are shown net of outside manager fees. Actual client accounts may incur other transactions costs such as SWP advisory fees, brokerage commissions, custodial costs, and other expenses. The net compounded impact of the deduction of such fees over time will be affected by the amount of the fees, the time period, and the investment performance.

Past performance of investments is not indicative of their potential future performance. Moreover the performance of a specific individual client account may vary substantially from the investments results based on the percentage of the clientís account allocated to one or more of these portfolios. Different types of investments involve varying degrees of risk, and there can be no assurance that any specific investment will be profitable. The use of investment performance is presented for comparative purposes only and has not been independently verified by SWP. Comparison of investments to the S8iP 500 and/or Barclay's Bond Index is for illustrative purposes only, and the volatility of these indexes may be materially different from the volatility of investments due to varying degrees of diversification and/or other factors. Investors cannot invest directly in an index.

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