

Agenda

Associated Eye Care

July 22, 2021 12:00-1:00PM

1. Introductions

Matt & Glenn – who we are/ how do we help

2. 2020 Market in Review

Covid / Shutdown / Reopening

3. 2021 Outlook

Reopening Story, Interest Rates, Stimulus

4. Market Discussion

Matt & Glenn open discussion with top questions

Our Approach

4 Key Tenants

- Asset Allocation (90% of long term performance vs. security selection)
- Diversification (important for risk management and income)
- Professional Management (increased volatility, global arena, price competitive)
- Focus on Income (total return = growth + income)

Beliefs

Product Neutral / "Fair – Fair"
Pro-Advisor / Pro-Family
Educate vs. "Sales" (empower to make decisions)

Our Approach

We cannot predict the future
We cannot execute perfect timing
We cannot beat indexes, averages and competitors year after year

But....

We can and will pay attention to your situation
We can and will adjust your approach according to your life needs
We can and will keep our word to you