



PREMIER WEALTH MANAGEMENT

INTERNAL MONEY MANAGEMENT PROGRAM

Providing long-term strategies using risk-reducing solutions and strategic management.

INVESTING WITH COMMITMENT



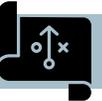
Our Models

Premier Wealth Management is a flexible multi-model allocation designed with fundamentals at the top of mind. We strive to help investors make the most of what they have by improving income, managing downside risk, and increasing portfolio longevity. Our Bull Bear models cater to accounts exceeding \$100k, while our core models are designed for accounts below this threshold. Both sets of models feature five distinct risk tolerance levels, ranging from conservative to aggressive.



Our Partners

The Premier Wealth Management Team is comprised of team members with diverse backgrounds and strengths. We collaborate with esteemed product partners such as BlackRock, JP Morgan, and American Century by utilizing their screening tools, portfolio management knowledge, and market insights to strategically complement our own resources, knowledge, and technology. Our team is committed to conducting thorough, research-based analysis with statistically proven results.



More Than Just a Strategy

We are more than your portfolio manager. We take a holistic approach that allows us to personalize and adapt to your client’s needs. We believe that a hands-on approach with communication and connection is key to understanding how we can serve you and your clients. Our highly sophisticated, personalized portfolios are customized and individualized—just like your practice.



What’s the Cost?

The PWM IMM program is priced at 30 basis points. With this, you gain access to Black Diamond, an extensive reporting tool and client portal, and can leverage our team for portfolio comparisons between your clients' existing accounts and our models.