ORGANIZE.

PLAN.

REVIEW.

888 (201)-5488
planning@pensionmark.com
www.pensionmark.com

Pensionmark®

Go confidently in the direction of your dreams. Live the life you have imagined.

- HENRY DAVID THOREAU

WHO WE ARE

We Are Your Financial Advocate

We take the time to understand what you want out of life – for yourself and for your family.

We employ a comprehensive planning approach combined with sophisticated technology designed to optimize your results and help achieve your financial goals.

We have years of experience collaborating with clients like you. We believe your financial information should be organized, up to date, easy to understand and accessible to you whenever you want, from wherever you are.

We understand that unexpected events and life changes can impact your dreams. We monitor and track your progress every day and adjust your financial plans along the way.

As your financial advocate, your success is our success.

Our Planning Process Can Help You Achieve Your Financial Dreams

We start by helping you identify your goals and evaluate where you are relative to those goals.

We evaluate your options and recommend strategies to help you get you where you want to be.

We don't stop there. We help you implement the recommendations. Then, we continually monitor your financial situation to ensure you remain on track to achieve your financial dreams.

Your goals remain the centerpiece of our recommendations and strategies.

WHAT WE DO

HOW WE DO IT

We take a comprehensive view of your complete financial picture to develop a deeper understanding of what is required to achieve your goals.

Complete Financial Picture
We link all your financial accounts for a complete and up-to-date view of your financial situation. Our analysis and recommendations are comprehensive and reflect current market conditions.

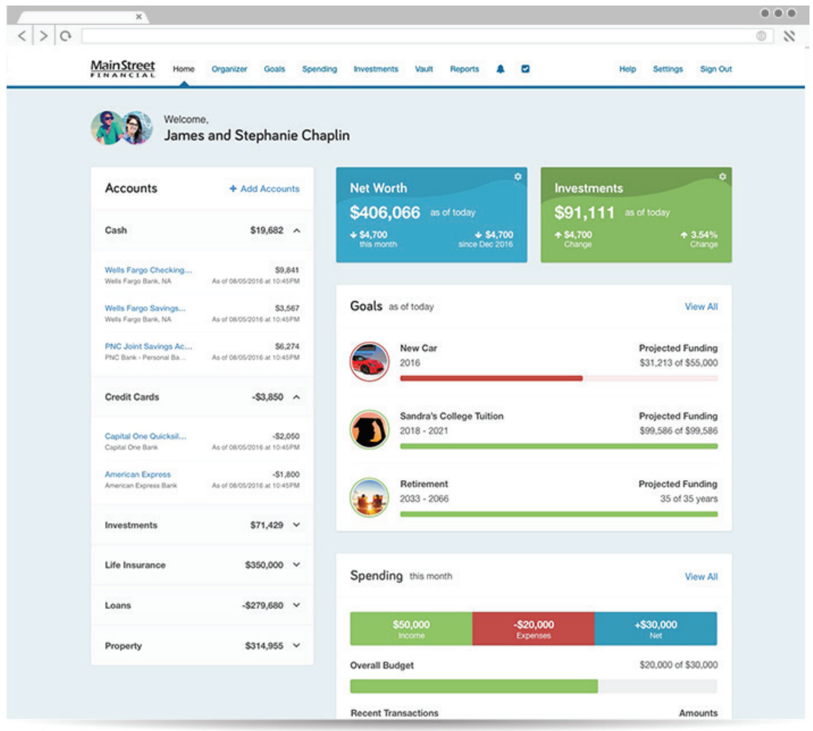
Monitor Progress
With a daily snapshot of your progress, we can alert and remind you of financial factors that may impact your ability to achieve your goals. This relieves you of organizational burden, allowing you to focus your energies on what matters most in your life.

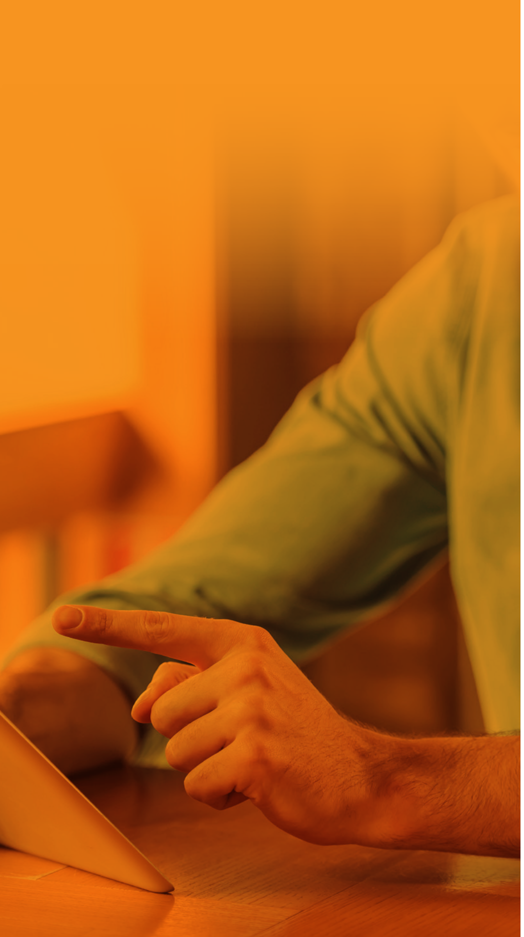
Increased Collaboration
Our wealth management system provides both you and our team with a secure view of your financial progress. We can collaborate with you online at anytime, no matter where you are.

WHAT WE PROVIDE

We make your life easier by providing unique services for staying organized, updated and prepared.

Personal Financial Website





Organizer
Connect all your accounts for a consolidated view of your entire financial picture.

Track Spending
Know how much you're spending, and where.

Investments
Interactive charts and detailed views help monitor all your accounts.

Screen Sharing
Join a screen sharing session quickly and easily for interactive planning anytime, anywhere.

Budgeting Tools
Set budgets to help reach your savings goals.

Mobile
A complete financial picture available on your smart phone.

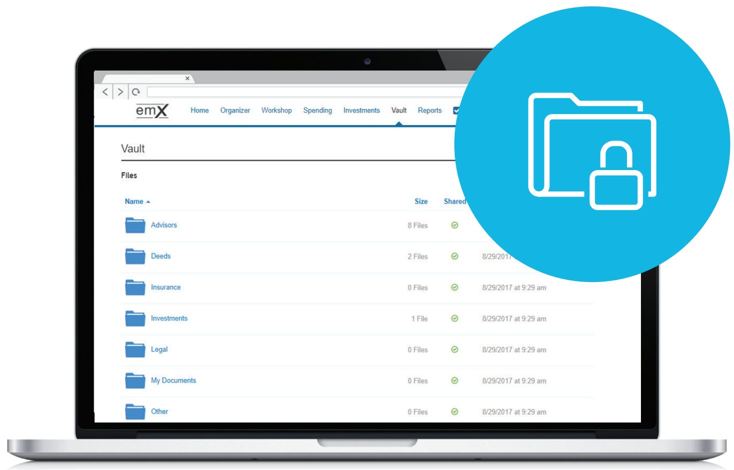
Vault
Safely store your most important financial documents, accessible 24/7.

Goals
See if you're on target to reach your most important goals.

PROTECT YOUR IMPORTANT DOCUMENTS

Vault Checklist

With unlimited secure document storage, you can organize and protect your most important documents. Review the checklist below and start adding to your Vault today!



LEGAL DOCUMENTS

- ☐ Wills
- ☐ Deeds
- ☐ Revocable & Irrevocable Trusts
- ☐ Power of Attorney
- ☐ Codicils (Supplements made to a Will)
- ☐ Living Wills/Health Directives
- ☐ Prenuptial Agreements
- ☐ Buy/Sell Agreements
- ☐ Contracts

BENEFITS

- ☐ Social Security Info
- ☐ Veteran's Administration Info
- ☐ Employment Benefits

INSURANCE POLICIES

- ☐ (Life, LTD, Disability, Medical, Car, Property)

BANK & INVESTMENT STATEMENTS

- ☐ Pensions, IRAs, Annuities, etc.
- ☐ Investment Accounts
- ☐ Stock Options/Certificates

LIABILITIES

- ☐ List of Credit Cards with Contact Information
- ☐ Mortgages
- ☐ Loans

TAXES

- ☐ Tax Returns
- ☐ W-2 Forms

IDENTIFICATION

- ☐ Birth Certificates
- ☐ Drivers Licenses
- ☐ Passports
- ☐ Social Security Cards

FAMILY

- ☐ Adoption Papers
- ☐ Medical Records
- ☐ Marriage License
- ☐ Pictures
- ☐ Audio Files
- ☐ Video Clips

PROPERTY

- ☐ Titles to Homes, Autos, Boats, etc.
- ☐ Warranties

We believe that it is critical for employees to have access to responsive, live staff to assist them in navigating their retirement plan strategy. Registered and bilingual specialists are available. Our call center hours are Monday through Friday from 7:00 a.m. to 7:00 p.m.

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Schedule an appointment today!

Scan the QR code above from your mobile device by pointing the camera in the direction of the code and then clicking the URL notification.

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> "What you leave behind is not what is engraved in stone monuments, but what is woven into the lives of others.
>
> - PERICLES