THE BRIDGEWAY GROUP
Building a Financial Bridge to a Secure Future

Our Second Opinion Service

Exclusively for friends, family and associates of our valued clients and colleagues

In this challenging economy, you probably know a friend, family member or colleague who may be in a complex situation or just unhappy with the advice from their financial advisor—it's not uncommon. Recent studies have shown that over 80% of high net worth investors would value a second opinion. And according to a recent study by Vanguard, financial advisors can add about 3% of value in net portfolio returns over time.

In order to help the people you care about achieve their financial goals, we have created our complimentary Second Opinion Service. We're pleased to offer your friends, family and associates some of the same expertise and guidance that you've come to expect as a valued client of The Bridgeway Group.

Working with a team that redefines wealth management

Ask ten investors to define wealth management. Actually, ask ten "wealth managers" to do so. You'll almost definitely get ten different answers, and most are likely to be heavily focused on investing. As a client of The Bridgeway Group, however, you benefit from a cutting-edge team that has a clear and comprehensive vision of wealth management.

Wealth management

Investment consulting	+	Advanced planning	+	Relationship management
• Asset allocation • Portfolio management • Manager due diligence • Risk evaluation • Performance analysis		• Wealth enhancement, including cash flow management and tax minimization • Wealth transfer • Wealth protection • Charitable giving		• Regularly scheduled calls, reviews and in-person meetings • Team of professionals, including legal, tax, insurance and investment advisors

Our consultative process

We approach each new engagement with a time-tested, collaborative process. This allows us to have an open dialogue in which we learn about your values and goals while working with you to tailor a plan to help meet them. As a valued client, you'll recognize each of the five steps below and can offer a portion of our services, complimentary, to your friends, family and associates.

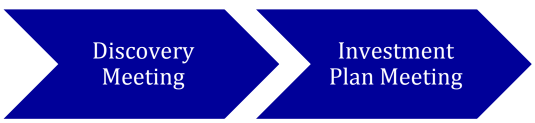
Full client experience

What to expect from the Second Opinion Service

We will meet with your friends, family and associates for a discovery meeting and then invite them back for a wealth management plan meeting. Hopefully, we can confirm they're on track to meet their values and goals. If needed, we'll suggest ways in which we can help, including recommending someone else if we're not a good fit for their needs.

Either way, they'll receive both a Total Client Profile and personalized analysis of their current situation.

Second Opinion Service



Let us help those <u>you</u> care about. Contact us today.

The Bridgeway Group

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