KEATING WEALTH MANAGEMENT

Executive Summary

Quick Facts

- ♦ Registered investment adviser
- ♦ Comprehensive financial planning and investment advisory services
- ♦ Fiduciary
- ♦ $1 million minimum account
- ♦ Fee only

What's Different?

- ♦ Value promise
- ♦ 10 client deliverables across 5 disciplines

Fees

- ♦ 1% of assets up to $5 million; flexible pricing for larger accounts
- ♦ Billed and deducted monthly

Custodian

- ♦ Charles Schwab & Co., Inc.
  - Statements
  - Online access

Typical Client

- ♦ $2 million - $10 million investible assets
- ♦ Financial delegator
  - Private business owner
  - Busy professional

Timothy J. Keating Vitae

- ♦ 32 years Wall Street experience
- ♦ 1985 Harvard College, *cum laude*
- ♦ Keating Investments, LLC (founded 1997, sold 2014)
- ♦ Previous: Bear Stearns; Nomura; Kidder, Peabody

Keating Wealth Management

Keating Wealth Management, LLC is an investment adviser that provides comprehensive financial planning and investment counsel to financially successful people and families who want to do something else with their valuable time besides managing their money.

We act as a fiduciary, which means all our advice to you must always be in your best interests.

Unlike many financial advisers who offer value propositions emphasizing market timing or fund/security selection to justify their fees, we don't propose; we *promise* compelling value—making sure you have time for what matters.

Our Value Promise

We'll take care of everything related to your financial planning, so you can live your life. All your financial choices will be aligned with your most important goals and most deeply held values. We'll get your entire financial house in perfect order and keep it that way forever. No matter what happens in the markets, the economy, politics or the world, you will have complete confidence that you will achieve your goals.

Planning, Advice & Accountability

- ✔ **Coordination.** We will orchestrate the activities of all your financial, tax, insurance and legal professionals on your behalf so that they work in concert, ensuring you get the best advice from each.
- ✔ **Consolidation.** You may have more accounts with more institutions than is necessary to achieve your goals. We will consolidate your financial affairs, reducing the complexity, so you can easily understand it all.
- ✔ **Comprehensive service.** We will address any gaps in your planning and take care of whatever important tasks need to get done so that your financial house is in perfect order.
- ✔ **Simplification.** We will create a clear, actionable plan that will simplify your life, so you can focus on more important things than managing your money.
- ✔ **Accountability.** We will hold your advisers accountable to give you the best advice for your financial situation, and we will hold you accountable to do your part by implementing their recommendations.

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