PICKLER
WEALTH ADVISORS

PICKLER
WEALTH ADVISORS

OUR FAMILY DELIVERING SOLUTIONS FOR YOUR FAMILY.

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PICKLER
WEALTH ADVISORS

FROM WALL STREET TO MAIN STREET

Pickler Wealth Advisors is an award-winning independent firm dedicated to empowering your dreams. We bring the resources of **Wall Street to Main Street**, creating a plan for you that is personal, relevant, and achievable.

We pride ourselves on advisory excellence, assembling the appropriate tools to provide you with what we believe is the best advice and counsel. We understand the complexities associated with managing finances and are here to guide you every step of the way. Because of our partnership with The Pickler Law Firm and Pickler Accounting Advisors, we deliver solutions and bring actionable steps to make your plan work.

Small Town Values make us who we are. We believe in community and invest in you as a valued member of our family — not just as another client.

As your trusted advisor, we partner with you to navigate through life's challenges and obstacles to pursue your goals. We prepare you for the future.

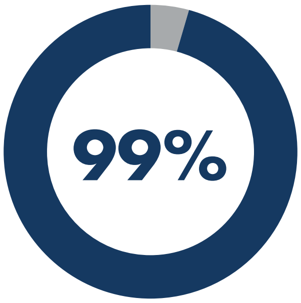
Our job is to understand what's important to you, develop a roadmap to get you there, and turn your vision into a reality. We are committed to excellence in client service and only consider ourselves successful when we are viewed as significant in your life.

The Pickler Law Firm, LLC, Pickler Accounting Advisors, PLLC, and Commonwealth Financial Network are separate and unrelated entities.

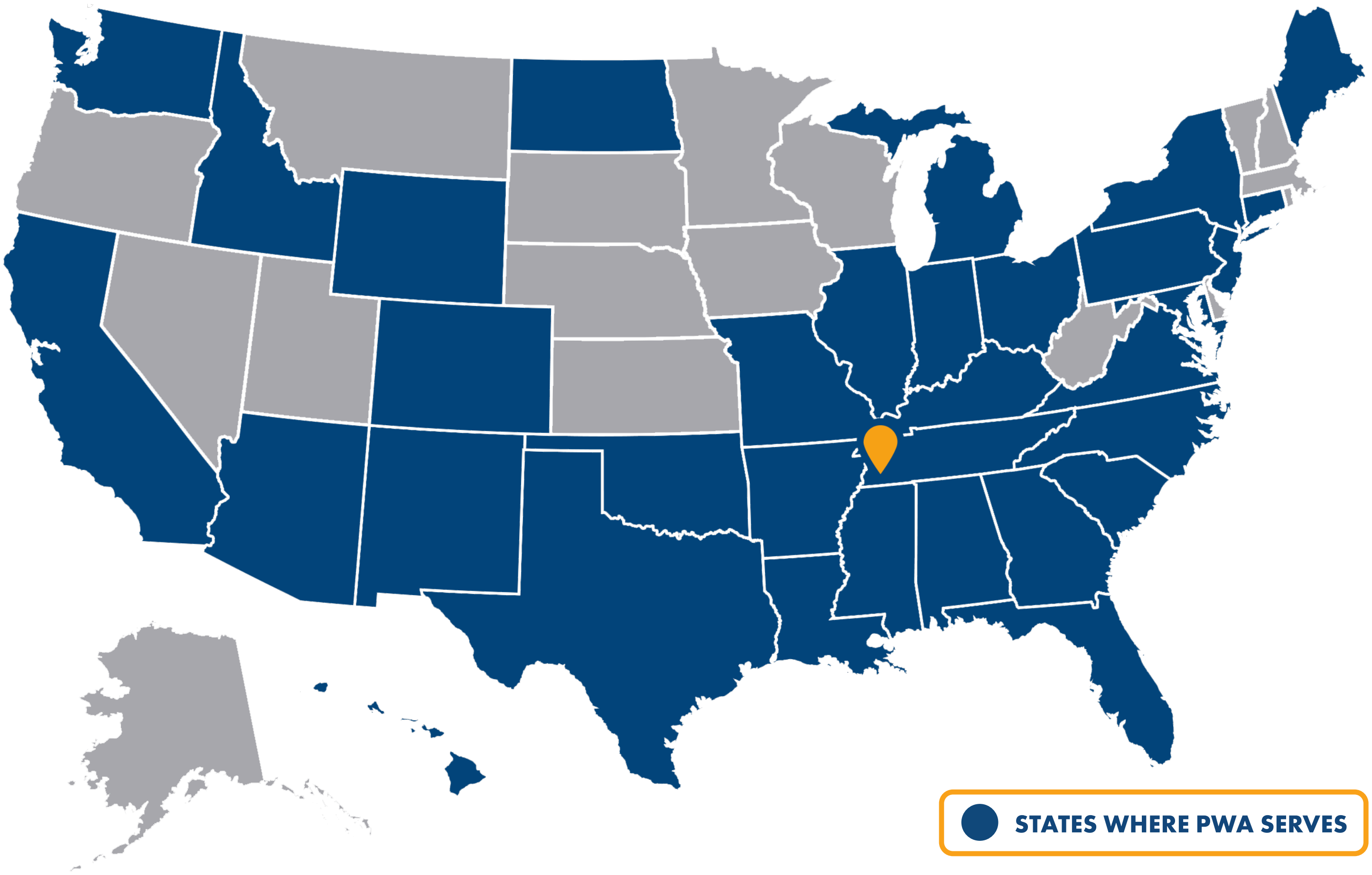
A NATIONAL FIRM WITH LOCAL VALUES

Pickler Wealth Advisors has served clients across the country since 2005, and has garnered national acclaim. Led by David Pickler, PWA continues to grow — not only because of our dedicated team of professionals — but because of clients like you. Take a glance at some of our statistics to help you better understand our reach, services, and capabilities.

CLIENT RETENTION RATE*



700	36	343M	15+
CLIENTS SERVED	STATES SERVED	ASSETS UNDER ADVISEMENT	YEARS IN BUSINESS



**Client Retention Rate based off of data from January 1, 2020 - December 31, 2020*

Numerical statistics based off of Q1 data from 2021

THE CORE VALUES OF PWA

Pickler Wealth Advisors holds fast to the belief that maintaining a **clear set of values** is an important piece of the advisor/client relationship. Above all, we value accountability, transparency, and consistency in everything that we do.

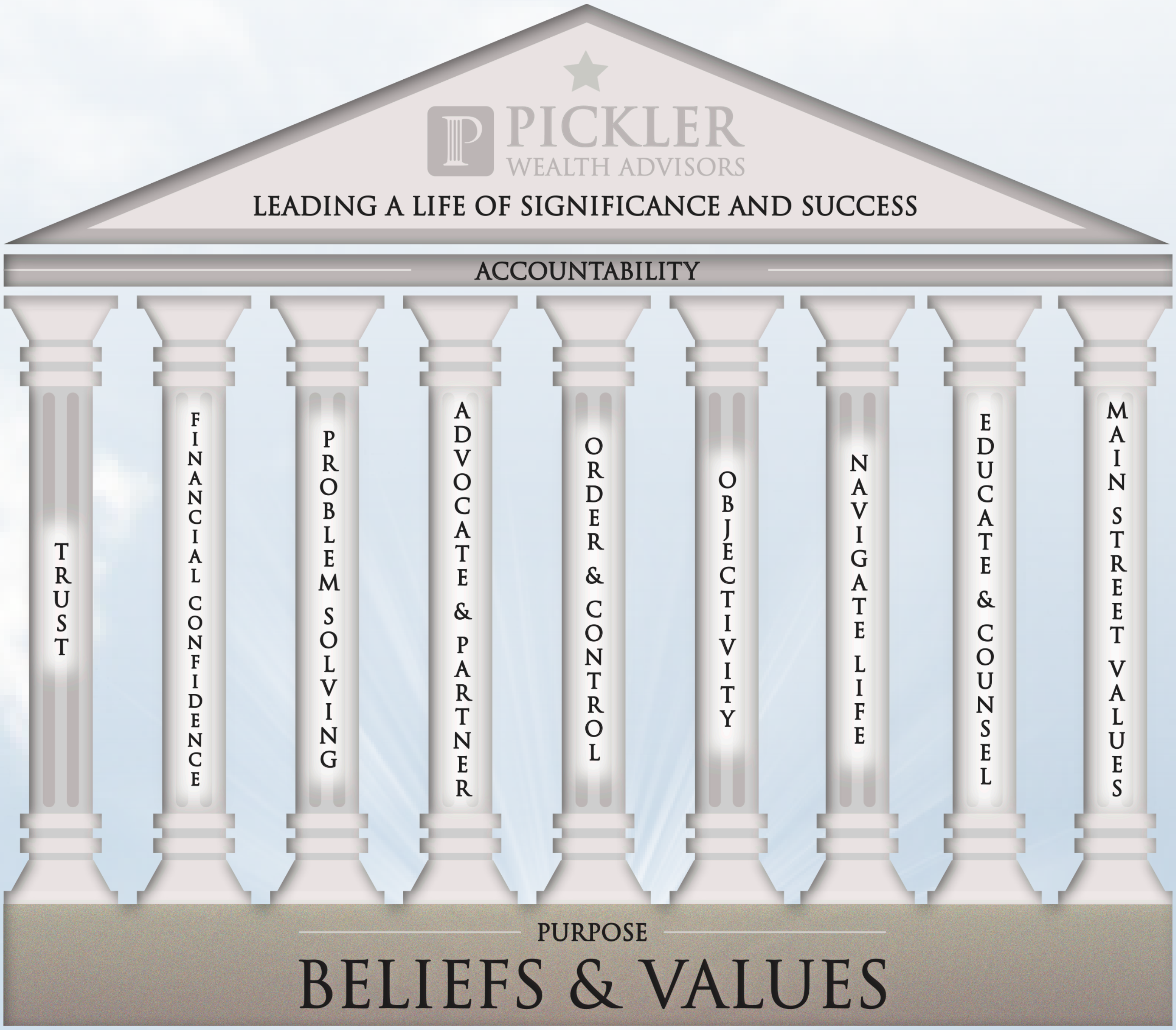
COMMITMENT CREED: OUR PROMISE TO YOU

- We define success as being **significant** in the lives of the clients we serve and the communities in which we live.
- We **make a difference** in the lives of our clients. We celebrate their achievements and support them in the times of challenge and adversity, helping them navigate through life's turbulent waters.
- We **empower** our clients' dreams.

PILLARS OF PURPOSE

STRIVING FOR EXCELLENCE IN ALL THAT WE DO.

Pickler Wealth Advisors is built upon nine pillars that support our firm. These pillars represent our **essential principles** — they define how we deliver solutions for you. These pillars establish the foundation that supports our commitment to accountability, **empowering our clients to lead a life of success and significance**.



PILLARS OF PURPOSE: THE PWA DIFFERENCE

1. TRUST

We believe in doing the right thing for the right reason. We place the interests of clients before our own and approach every aspect of our relationship with honesty, consistency, and integrity. **Trust is earned**. We take this to heart by remaining transparent in our processes. We are committed to "walking the walk" and being there when you need us the most, serving as your enduring ally.

2. FINANCIAL CONFIDENCE

Everyone has fear of the unknown. When people are confronted with a challenge, comfort comes when they can see a light at the end of the tunnel. **It is our job to shine that light and serve as a beacon of hope**. We are more than your advisor. We are your partner. We take the time to get to know you — who you are and what's important to you — so that we can provide objective advice and counsel. **Our goal is to provide you freedom from anxiety**.

3. PROBLEM SOLVING

Problem solving is **more than making a plan** — it's about adjusting the plan when life happens. As your Trusted Advisor, we will be by your side, identifying solutions to today's problems to help achieve a sound future for you and your family. When you call us, you will connect with a caring professional who understands you on a personal level. **We are always here for you and make *your* problems *our* priority**.

4. ADVOCATE & PARTNER

Our role is to passionately serve your interests, advocating for you as a trusted confidant, while helping you achieve your dreams. We support you in the pursuit of your goals and fight for you through adversity. Pickler Wealth Advisors remains focused and passionate about delivering solutions for you and your family.

5. ORDER & CONTROL

A commitment to bring **order from chaos** is the cornerstone of our nine pillars. We take all of the elements of your life and design a cohesive, comprehensive plan of action. Our job is to create a blueprint for success. Working with Pickler Wealth Advisors **empowers you to take control** of your life, goals, finances, and future.

6. OBJECTIVITY

Our process begins with us getting to know our clients on a deeper level. **We invest our time before we invest your money**. By inviting us into your life, you entrust us with valuable information and empower us to give you our impartial advice and counsel. Fully understanding your circumstances provides us the ability to deliver objective, educated opinions and solutions to your life's challenges.

7. NAVIGATE LIFE

Life happens. As former boxing champion Mike Tyson once said, "everyone has a plan until they get punched in the mouth." The strength of Pickler Wealth Advisors is in our ability to pivot in times of volatility or uncertainty, making sure your plan is always relevant. After all, **those who adapt are the most able to survive**.

8. EDUCATE & COUNSEL

Educating our clients is more than helping them understand investments. It's about **empowering clients to make the best choices while enriching their lives**. We are here to provide practical knowledge, help you understand what questions to ask, and how goals can be met. Whether it be a personal conversation on how to overcome an obstacle or providing a workshop on new tax laws, we are here to confidently guide you every step of the way.

9. MAIN STREET VALUES

People want to do business with people with whom they can connect. They want a sense of camaraderie and family. They aspire to belong. It's this **human desire to connect** that drives our firm to serve as an anchor in our community. The strength of America is in our communities. This commitment to community is the foundation upon which we build lasting relationships with you and your family. From Wall Street to Main Street, **our family delivers solutions for your family**.

OUR COMMITMENT TO CLIENT SERVICE

We believe a client relationship should be started and maintained through **stewardship**, not salesmanship. It doesn't matter how much you have invested with us, we put the same amount of care into each client relationship, treating you as our sole priority. We believe this philosophy has attributed to our client retention rate and client referrals — something we will never take for granted.

WHEN THE GOING GETS TOUGH, WE'RE HERE FOR YOU.

We understand that life is not always smooth sailing, and it can cause anxiety when planning for your future. That's where Pickler Wealth Advisors comes in. **We serve as your lighthouse in the storm** and work even harder for you when the going gets tough. Walking alongside you, we help you navigate the ups and downs and communicate every step of the way. **That's the Pickler Promise**.

Consider Pickler Wealth Advisors as an extension of yourself and your family. We communicate *for* you to our team, always staying proactive in caring for you and your investments. We build a **personal, lifelong relationship** with each of our clients, taking time to understand their unique situations. We help to ensure goals can be accomplished by providing objectivity, professional counsel, and financial confidence.

COMMUNICATION IS KEY

HIGH-TECH AND HIGH-TOUCH.

The single most important aspect of the way Pickler Wealth Advisors operates is our **commitment to ongoing monitoring and review**. This goes beyond the standard conference-room meeting and flows into everything we do. We are there for you when times are tough, and are **committed to connection, communication, and clarity**. We are a phone call away and proudly empower you with unlimited, personal access to your trusted advisor — day or night, 24/7/365. You can feel comfortable knowing a member of our team will handle your needs in a timely manner, with complete discretion and professionalism.

Market Calls with David Pickler

Dial into **BullTalk**, our Market Call hosted by David Pickler, and engage in a post-call Q&A session. Though these informative calls are typically held on a quarterly basis, we initiate these as often as necessary depending on the current economic climate. We believe this method of communication is the best way to keep you informed on market news and current events.

Weekly Market Updates

On a weekly basis, we electronically distribute our **Weekly Market Update** — a robust document that breaks down the current market into easy-to-digest pieces. This Update distills important information for our clients including "General Market News," "Market Index Performance Data," and "What to Look Forward to."

Stay Connected with PWA Online

Another important communication tool we utilize is our online content. Catch up on engaging, financial-related posts through our newest enterprise, **The Bull Blog**. Authored by key members of the PWA team, this blog gives readers insight into investing, saving, and everything in between. We also encourage clients to follow our **social media channels** where we post compelling articles, community initiatives, and upcoming client events.

The PWA Talkshow

Tune in to our NEW talkshow, **BullTV**. Hosted by David Pickler and produced by Collierville High School, this monthly show takes a deep dive into topics we are passionate about like finances and investing, estate and tax planning, and promoting financial literacy and workforce development. The show also — and most importantly — highlights local citizens and businesses who are doing incredible things in our community.

COMMUNICATION IS KEY

The PWA Podcast

As part of our commitment to being high-tech and high-touch, we launched a podcast called **BullCast**. Delivering real talk while making financial topics more accessible, co-hosts Katie Pickler and Cort Winsett break down personal finance into engaging, bite-sized topics. Join them on their journey to "remove the veil" as they bring a basic level of awareness in a relatable, honest, and pop-culture-fueled format.

Exclusive Access to Events

We are passionate about **creating events that enrich the lives of the clients** and communities we serve. On a monthly basis, we host celebrations, workshops, and galas which bring people together. Whether it be our *Market and a Movie* event where we screen the latest blockbuster, an *Authentic Italian Wine Tasting Experience*, or our *Great Performances* private jazz concert, we're confident you will find an event to fit your lifestyle.

State-of-the-Firm Letter

At the beginning of each year, our firm mails out David Pickler's **State-of-the-Firm Letter** to every client. This communiqué serves as an annual message that informs you of what is happening at Pickler Wealth Advisors. It also states David's predictions on what to expect in the following months when it comes to the economy and markets. We believe this letter is a perfect way to stay transparent with our clients while also keeping in touch.

My Two Cents

Every Tuesday, David Pickler sends out **My Two Cents**, a weekly e-newsletter that captures his thoughts on current events. Subscribe to *My Two Cents* to get a better picture of our world through interesting articles, pictures, videos, and more!

BULLTV | BULLTALK | BULLCAST

Discover all of this engaging content plus more at www.TheBullNetwork.com

THE PICKLER PROCESS

Pickler Wealth Advisors provides **goals-based wealth management**, personalized advice, and intellectual capital to help solve your problems.

STEP 1 UNDERSTAND

You have unique passions and goals, and Pickler Wealth Advisors is committed to learning about you and what is important to you and your family.

We want to **develop a clear understanding** of your family, your interests, and your passions because that helps us create a customized wealth management solution that will help you achieve your life goals.

- We send our Confidential Client Profile
- Initial Client Consultation
- Data gathering for planning reviews

STEP 2 ANALYZE

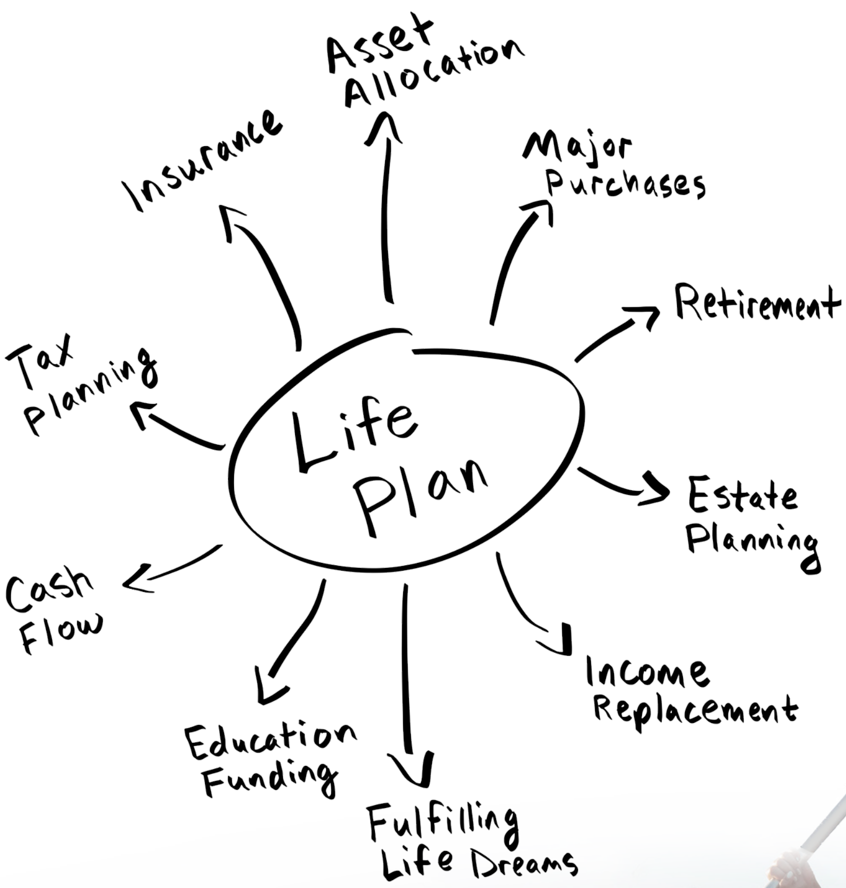
It is important for us to establish a deep understanding of your current circumstances as well as your goals and dreams for the future. **This process will empower you to more clearly identify personal and financial goals** including retirement objectives, education funding, tax planning, and developing your own bucket list.

- Initial assessment and analysis of data
- Formulate goals and objectives

THE PICKLER PROCESS

STEP 3 PLAN

We have comprehensive planning tools that allow us to use your personal financial data and our understanding of your needs to **design a customized plan for you**. We will build a plan that places your assets in investment vehicles that will best achieve your goals. A successful plan will also provide for a successful transfer of your wealth. Your plan will include estate planning recommendations, life insurance needs analysis, and estate tax planning. We provide solutions that include business succession planning, family trusts for transfer of your assets, and charitable gifting wishes.



Financial planning is at the heart of what we do. It is not something that is done once and then never considered again. Financial planning is a process that continuously revolves around you, the client. The ultimate product of this process is a **Life Plan** that takes into account a broad array of considerations that may not have even occurred to you.

- Planning presentation
- Implementation plan

THE PICKLER PROCESS

STEP 4 IMPLEMENT

Your plan will **incorporate specific strategies** that will be integral to converting your plan design into action. The implementation of the plan is the technical aspect of the process. In this stage, we handle all of the moving parts involved in actually getting your money working for you.

We will be responsible for setting up your new account(s), and will request a transfer of your existing assets into your new account(s). If it is part of your plan, we will facilitate the development of an estate plan and tax strategies, and will also help you obtain appropriate insurance.

- Decision point: would you like to move forward with the plan?
- Implementation of approved steps
- Execution of the Wealth Management Proposal
- Baseline Account Review

STEP 5 MONITOR

Perhaps the most important part of our advisory process is a **commitment to ongoing monitoring, review, and communications**. As your life and markets change, so too must your plans. Our disciplined process of systematic review will provide the greatest opportunity for planning success and achieving your goals.

Our model depends upon our ability to observe your progress and track your growth or lack thereof, so we will meet with you immediately after investing your assets to establish the baseline for all your future account reviews, and then we will meet with you every year thereafter to review your progress.

You will receive regular statements of your accounts and, should you have questions, you will have considerable access to us for answers. Meanwhile, if you have any changes in your life that might affect your plan, we will rely on you to notify us so that we can analyze your new circumstances and determine if changes to your plan are called for.

- Systematic and ongoing review of your plan
- Update and review of Financial Plan Analysis and Estate Plan
- Client coordinate with administrators
- Access to technology and communications

SERVICES WE OFFER

Our client-focused process is tailored to help individuals set financial goals, develop a financial road map, and implement the appropriate financial tools and strategies.

Life Planning

A Life Plan is a strategy to help you reach your goals. Through data gathering and analysis, we guide you to financial comfort during your life while allowing for the efficient transfer of assets to your heirs.

Portfolio Management

Although investors must be willing to bear risk in order to achieve an expected return, our main goal is to help our clients manage financial risk through sound planning and financial control.

Strategic Asset Allocation

Strategic asset allocation is the process of dividing your investment dollars among a variety of complementary asset classes, such as stocks; bonds; real estate; and short-term, highly liquid vehicles so that your portfolio is well diversified.

Income Strategies

We develop optimized strategies to match your income needs with available assets and resources to help maximize tax efficiency and find opportunities for creating lifetime cash flow.

Estate Management

Estate management is the process of creating a master plan for the management of property during life and the distribution of that property at death. Done correctly, estate management should give you more control over your assets.

Tax Planning

Unplanned financial transactions can result in recurring tax fees or large tax penalties, so we take into account the potential tax consequences of the financial decisions we make together.

Insurance Needs Analysis

How do you decide between permanent and term life insurance? Which policies carry risk and which are guaranteed? Which policy will cost most? We are here to guide you through the confusion and select a plan that works best for you.

Family Wealth & Estate Planning

Our role in counseling multigenerational families on the transfer of wealth is twofold: (1) To guide existing clients on the most tax-advantaged ways to pass along wealth in line with their current goals. (2) To educate the younger generations on the potential for sudden windfalls and on how to be prepared ahead of time.

VALUE-ADDED SERVICES

We offer a suite of financial, legal, and planning services, empowering you to achieve your goals. Our firms believe that when you invest in your community, you improve the lives and businesses around you.

The Pickler Law Firm is dedicated to providing outstanding legal advocacy and superior client service. Our experienced professionals offer legal excellence in comprehensive estate planning, probate administration, family law, civil dispute resolution, and corporate law. The law firm specializes in financial, legal and risk management, as well as strategies to protect client's assets and ensure maximum tax efficiency.

Pickler Accounting Advisors was founded in 2012 and merged with **Robert Kin Campbell, CPA** in 2020. With 130 years of experience in the tax field, the team is dedicated to both the clients and community. The accounting firms in Collierville, TN and Russellville, AR offer many services including tax preparation, software implementation, IRS issue resolution, and bookkeeping work.

Pickler Events believes "it's all in the details." As a premier event planning and coordination service in the Mid-South, we help make your dreams a reality. Whether it be a fairy-tale wedding, an intimate networking event, or a grand fund-raising gala, we are here to bring your next event to life!

The Pickler Law Firm, LLC, Pickler Accounting Advisors, PLLC, Pickler Events, and Commonwealth Financial Network are separate and unrelated entities.

RECOGNITIONS & ACCOLADES

Pickler Wealth Advisors is an **award-winning independent wealth advisory firm**. We have been recognized as an industry leader in the state of Tennessee and in the nation by the likes of *Barron's** and the *Financial Times***. When you are considering an advisory firm, there are objective criteria you can take into account that are the same elements considered by these top industry analysts. How much weight you place on each criteria is up to you, but consider your prospective advisor's credentials, time in the industry, and quality of practice including regulatory record, education, and assets under management.

But more than hard facts, measurements, and criteria, consider the people with whom you might work. David Pickler has built his personal and professional life on the principles of **community service, civic leadership, and philanthropic investment**. He has been a long-time advocate of public education and has dedicated much of his life to its improvement. His non-profit foundation, the American Public Education Foundation, focuses on financial literacy, workforce development, and innovation. In 2019, David was recognized by *Invest in Others*, a nonprofit "dedicated to supporting and empowering financial advisors who invest in others," with the Catalyst Award. This accolade is given to an advisor who "has made an outstanding impact on a community through leadership contributions to a nonprofit organization."

Forbes BEST-IN-STATE WEALTH ADVISORS 2019 SHOOK RESEARCH™

IiO 2019 Invest in Others Catalyst Award WINNER

FT FINANCIAL TIMES Top Financial Advisers

BARRON'S TOP ADVISORS

FEATURED IN Kiplinger's PERSONAL FINANCE

FIVE STAR WEALTH MANAGER

*2011-2012 Barron's Top 1000: To compile this annual list, Barron's uses data provided by advisors and takes a number of criteria into account for this state-by-state ranking, including assets under management; revenues generated by advisors for their firms; quality of practices, which includes examination of regulatory records; and philanthropic work. According to Barron's, generally 3000 qualified advisors are considered each year, with 30% of those advisors recognized as a Barron's top financial advisor. Some states may include more advisors than others, in proportion to state populations. 15 Tennessee advisors made the list both years. The state specific ranking is the same list organized and filtered by advisors located in that state. Investment performance is not a criterion. This award is not indicative of the wealth manager's future performance. Your experience may vary.

**FT 400: To compile the 2016 list, the Financial Times evaluated nominees on six primary areas and calculated a numeric score for each advisor. The areas of consideration were assets under management (AUM), asset growth, compliance record, experience, credentials, and accessibility. Approximately 985 qualified applications were received; 400 advisors were selected, representing 40.6 percent of applicants. Not indicative of advisor's future performance. Your experience may vary. For the full methodology, please visit ft.com

Five Star Wealth Manager: Based on 10 objective eligibility and evaluation criteria, including a minimum of 5 years as an active credentialed financial professional, favorable regulatory and complaint history, accepts new clients, client retention rates, client assets administered, education, and professional designations. 690 Memphis wealth managers were considered for the award; 143 (21 percent of candidates) were named 2015 Five Star Wealth Managers (The criteria provided reflects the most recent year for which advisor received the award. The criteria used, the number of wealth managers considered for the award, and the percentage of those who receive the award, may vary from year to year). These awards are not indicative of the wealth managers' future performance. Your experiences may vary. For more information, please visit www.fivestarprofessional.com.

INVESTING IN OUR COMMUNITY

We are always working to make lives better, not only finding solutions for you, but for our community as a whole.

A central part of Pickler Wealth Advisors' culture revolves around **community involvement**. Advisors and staff are encouraged to be actively involved in the community, a charge which is led by David Pickler. Over the years, David has been actively involved with public schools through the Shelby County School Board, the Tennessee School Boards Association, the National School Boards Association, for which he served as President, and his own non-profit, the American Public Education Foundation. He continues to be involved through his foundation with fostering workforce development and financial literacy programs in the local school systems including Collierville Schools and the five other suburban districts. Furthermore, he offers his volunteer time to Collierville Schools and the Germantown Municipal School District, through non-profit fundraising groups like Partners in Education and the Houston High School Athletics and Arts Foundation, to help with their ongoing capital campaigns that keep their schools on the cutting edge in programs, facilities, and technology.

Another non-profit that is close to the heart for Pickler Wealth Advisors is Memphis Oral School for the Deaf (MOSD). This is a relationship that began with David and his wife Beth and continues to this day. Pickler Wealth Advisors sponsors MOSD's biggest annual fundraiser and our staff regularly volunteers to engage with the non-profit's students. David also serves as a board member of the Orpheum Theatre and has been actively involved with the Chickasaw Council of the Boy Scouts of America since his son's days as a scout.

AMERICAN PUBLIC EDUCATION FOUNDATION

COLLIERVILLE SCHOOLS

GERMANTOWN MUNICIPAL SCHOOL DISTRICT

SHELBY COUNTY SCHOOLS Excellence since 1867

COLLIERVILLE CHAMBER OF COMMERCE

Memphis Oral School for the Deaf

ORPHEUM theatre group

TSBA TENNESSEE SCHOOL BOARDS ASSOCIATION

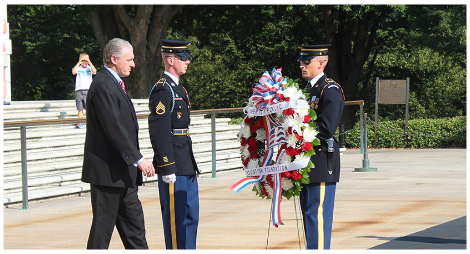
CHICKASAW COUNCIL BOY SCOUTS OF AMERICA

JDRF

nsba National School Boards Association

COMMUNITY SERVICE IS THE HEART OF PWA

Pickler Wealth Advisors was founded on the principle that success is only achieved when we are viewed as significant in the lives of the clients and communities we serve.



BIOGRAPHY OF DAVID PICKLER

David A. Pickler, Esq., CFP®, CPWA®, ChFC®, CDFA®

President & CEO

David began his career in the investment business over 30 years ago. He graduated Magna Cum Laude from Arkansas State University with a Bachelor of Science in Business Management degree in 1980 and from Cecil C. Humphreys School of Law, University of Memphis, with Juris Doctor Degree in 1985. He was admitted to the Tennessee Bar in 1986 and maintains an active practice emphasizing Tax and Estate Planning. He is a CERTIFIED FINANCIAL PLANNER™ professional, a CERTIFIED PRIVATE WEALTH ADVISOR®, a Chartered Financial Consultant (ChFC®), and a Certified Divorce Financial Analyst® practitioner.

David has built his personal and professional life on the principles of community service, civic leadership, and philanthropic investment. David began his community involvement with the PTA in his children's schools. David was elected to the Shelby County School Board of Education in 1998 and served as chairman for twelve years. He was then elected as the Tennessee School Boards Association President. In April 2013, David became the President of the National School Boards Association. He has twice been honored as Tennessee School Board Member of the Year. In July 2012, David was honored by the Academy of Education Arts and Sciences as a recipient of the "Educators Voice Award," and in September of 2013 he received the prestigious Bammy Award as "School Board Member of the Year." In 2019, David was awarded the *Invest in Others* "Catalyst Award" for his work in public education through his non-profit, the American Public Education Foundation — a 501(c)(3) in which he serves has Executive Director.

David has twice been named among the top 1,000 financial advisors in the U.S. in the February 2011 and 2012 editions of *Barron's* Magazine. Both years, he was named one of the top financial advisors in West Tennessee, which ranked him as one of the top 15 advisors in the entire state of Tennessee. He has been named a Five Star Wealth Manager for the past five years in a row, and in 2015, David was selected to the *Financial Times* 400 Top Advisors List. He was one of only seven advisors selected from the entire state of Tennessee. In 2020, he was honored in *Forbes'* Best-in-State Wealth Advisors list, being one of Tennessee's leading independent advisors.

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MEET THE PWA TEAM

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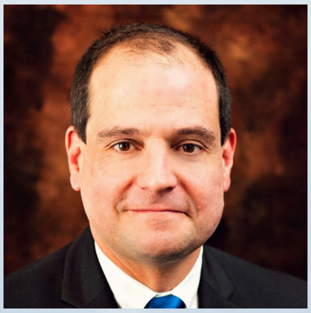

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THE PICKLER LAW FIRM

The Pickler Law Firm is dedicated to providing outstanding legal advocacy and superior client service. Our experienced professionals offer legal excellence in comprehensive estate planning, probate administration, family law, civil dispute resolution, and corporate law. The law firm specializes in financial, legal and risk management, as well as strategies to protect client's assets.

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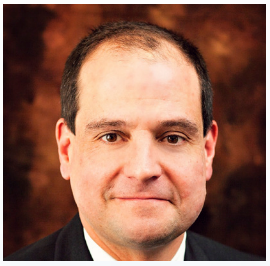

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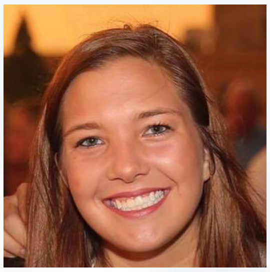

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