ABRAHAMSEN
WEALTH MANAGEMENT

OUR Strategic Relationships

AT ABRAHAMSEN WEALTH MANAGEMENT, OUR JOB AS YOUR FINANCIAL SERVICES FIRM

is to constantly be on the lookout for the best solutions for your specific financial situation. That's a responsibility we take very seriously. In our dedicated search for improved pricing and services, we have formed strategic relationships that we believe will help us best serve you.

At Abrahamsen Wealth Management, we believe it's our responsibility to share with you what's happening with your money after you decide to work with us. Here's a little information about a few of our top strategic partners.

Orion Advisor Tech is the powerful hub of our technology platforms.

Maripau Wealth Management is an SEC Registered Investment Advisory firm that provides us with money management support.

Riskalyze is a software that helps our firm identify your risk tolerance level so we can use that information when creating your financial plan and assessing any updates needed to help you pursue your goals.

Fidelity helps our firm by holding and safeguarding your financial assets.

MariPau Wealth Management is an SEC Registered Investment Adviser that is part of a full-service financial services company.

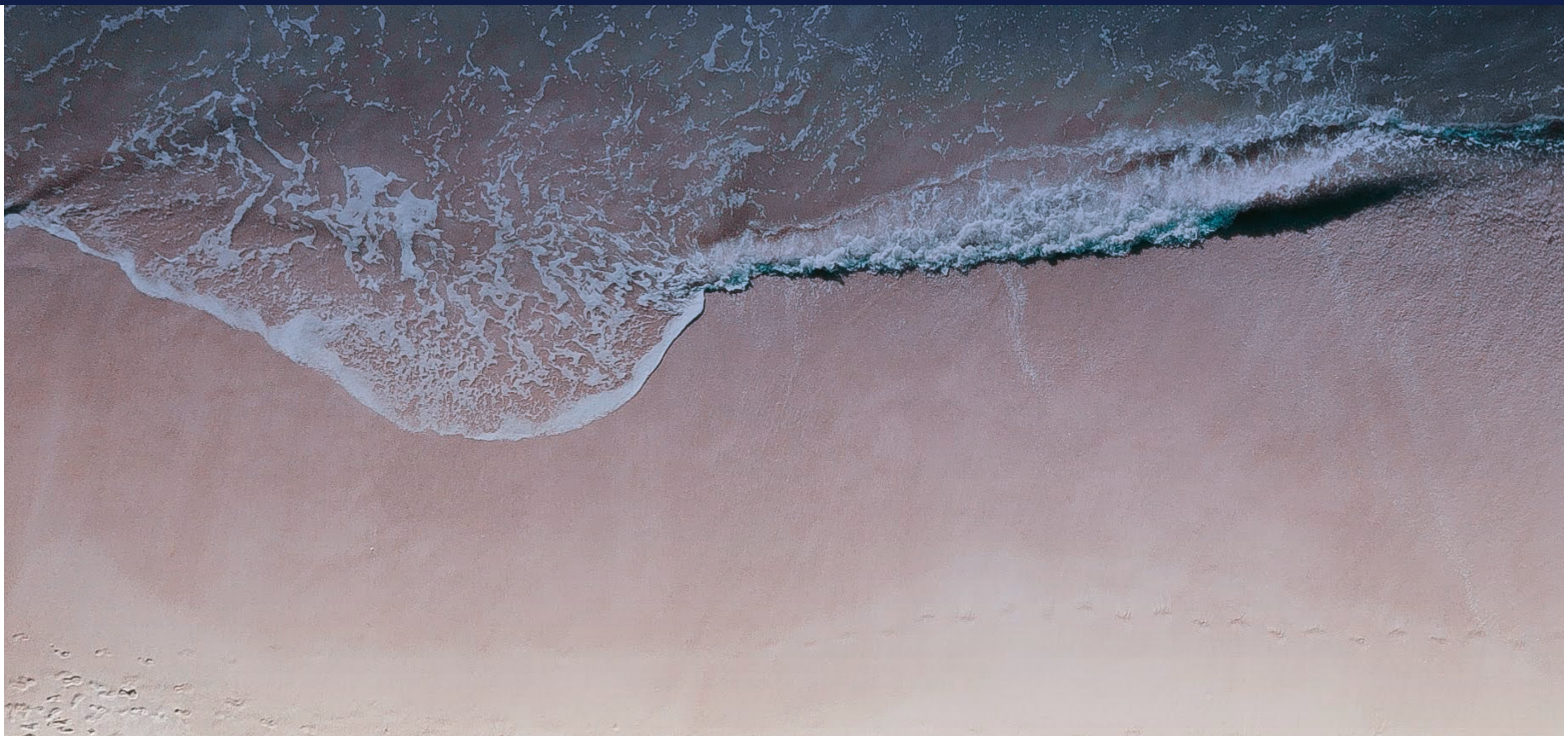
MariPau Wealth Management takes care of running our investment platform so we can spend more time working with you. They build out the tools and services we need to run our business, and together we combine investment management, financial planning and retirement planning services into one cohesive operation that is focused on helping you work toward your financial goals.

Some of the benefits and services MariPau Wealth Management brings to our partnership include:

- Opening and servicing accounts
- Reconciliation of trades for accuracy
- Comprehensive investment selection and asset allocation

With clear communication, straightforward pricing and constant evaluation, this all encompassing platform allows us to set a new industry standard for creating and executing effective, customized financial strategies.

MariPau
WEALTH MANAGEMENT

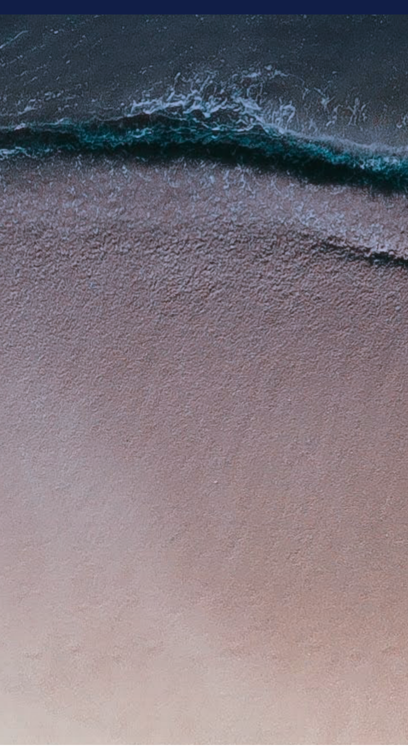


Learn More

Fidelity

Fidelity is our custodian. In financial services, a custodian is an entity that is responsible for holding your security assets for safekeeping. The assets they keep can be in digital or physical form, depending on how the assets were brought to them.

In addition to being the firm that actually holds your assets, fidelity provides additional services such as account administration, transaction settlements, collection of dividends and interest payments, and other support. Our ability to collaborate with fidelity for custodial services means that we have more time to dedicate to our clients.



ORION

Orion collects data from other platforms like Riskalyze. This software continually integrates account data and automatically links account households. By linking these platforms, advisors can create an effective strategy to help clients pursue their long-term investment goals.

riskalyze

Through its patented technology, Riskalyze takes into account key investor factors and creates a Risk Number. This unique number allows advisors to help clients adjust their portfolios accordingly and avoid knee-jerk reactions to market fluctuations.

Financial Terminology Glossary

Certain financial terms have you scratching your head? Use this quick glossary to clarify any questions.

CHARTERED FINANCIAL ANALYST:
An experienced financial analyst who has passed examinations in economics, financial accounting, portfolio management, security analysis and standards of conduct given by the Institute of Chartered Financial Analysts.

CHIEF INVESTMENT OFFICER:
An executive responsible for managing an organization's investment portfolios. The purpose is to understand and monitor the portfolio of assets and devise strategies.

FINANCIAL PLAN:
A comprehensive statement of an individual's long-term objectives for financial well-being. It often includes a detailed savings, investing and income strategy.

Independent Financial Advisor: A financial a dvisor who is not tied to any particular family of funds or financial products.

INVESTMENT ADVISER REPRESENTATIVE (IAR):
Individuals who work for and give advice, for a fee, on behalf of Registered Investment Advisers. They are required to uphold standards of fiduciary responsibility. Investment advisers may be primarily regulated by the U.S. Securities and Exchange Commission (SEC) or by one or more state securities authorities. For more information about an investment adviser, visit the Investment Advisers Public Disclosure website, **www.adviserinfo.sec.gov**. This database provides instant access to registration documents filed by more than 25,000 SEC- or state-Registered Investment Advisers.

INVESTMENT MANAGEMENT:
The act of coordinating and overseeing a client's financial portfolio.

PORTFOLIO:
A range of investments or financial assets held by a person or organization.

REGISTERED INVESTMENT ADVISER (RIA) FIRM:
Provides investment advice to others or issues reports or analyses regarding securities for compensation. The SEC regulates investment advisers who manage $110 million or more in client assets. Common names for investment advisers include asset managers, investment counselors, investment managers, portfolio managers and wealth managers.

RETIREMENT PLANNING:
Planning for the financial aspects of retirement, including income, expenses and financial actions necessary to pursue financial goals and objectives.

SEC (SECURITIES AND EXCHANGE COMMISSION):
Created by Congress, the mission of the U.S. Securities and Exchange Commission is to protect investors; maintain fair, orderly and efficient markets; and facilitate capital formation. The SEC oversees the key participants in the securities world, including securities exchanges, securities brokers and dealers, investment advisers and mutual funds. For more information, visit **www.sec.gov** and **www. investor.gov**.

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Investing involves risk, including the potential loss of principal. None of the information contained herein shall constitute an offer to buy security.

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