Wealth Management

BRIDGEVIEW WEALTH MANAGEMENT

Investment, Estate & Tax Planning

Any good investment strategy begins with a financial plan that assesses where you are in life and gets you where you need to be. Our professionals will help you develop a plan that is both financially sound and achievable providing you the peace of mind you need now and the security you hope to have later in life. Our services include:

Personal

Services

- Financial and Estate Planning
- Asset Management
- Tax Planning
- Insurance Planning

Products

- Mutual Funds
- Annuities
- Stock and Bond Brokerage
- 529 Education Plans
- Traditional and ROTH IRAs
- Life, Health, Disability Insurance
- Long Term Care Insurance
- Medical Supplements

Business

401k/Profit Sharing Plans

- Plan Design
- Investment Advice

Group Benefit Planning

- Health
- Life, Disability
- Section 125 Programs
- HSA Accounts
- Tax Advantage Planning
- COBRA/Claims Assistance

Business Planning

- Succession Planning
- Valuation and Buy/Sell Arrangements
- Key Person Planning
- Deferred Compensation

Our finance and investment professionals will work with you on a one-to-one basis to create a plan that is uniquely all about you and your future. Once in place, we not only assist with the implementation of the plan, but also offer continual monitoring to pinpoint areas for change and improvement moving forward. With ongoing reviews, we address changes to tax laws and codes that may impact your plan, and devise strategic revisions to keep your planning on track.



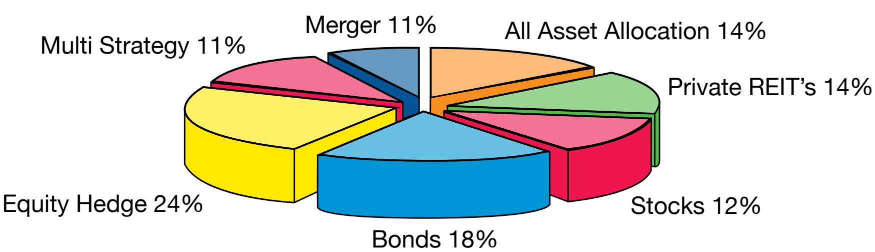
We offer one of the industry's most detailed reporting systems to provide our clients with a level of accountability and portfolio performance seldom found at most financial institutions. At ***Bridgeview Wealth Management*** we believe you should always know the status of your investments.

Asset Management & Research Analysis

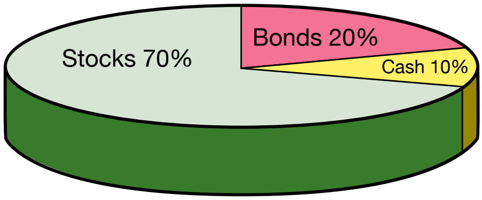
Most firms treat investing as a commodity, offering the same products with little or no difference. Investors with these firms are led to believe they are well diversified, due to having multiple holdings. The reality is most investors are poorly diversified with asset classes covering only stocks, bonds and cash and are simply measured by comparison to market performance.

Bridgeview Wealth Management has financial analysts who not only research each client's existing holdings, they create customized portfolios based on the client's specific goals. We provide clients strategies that are beyond what the typical portfolio will offer. Our philosophy creates truly diversified strategies with reduced risk and low correlation to general markets.

Bridgeview Wealth Management portfolio sample:



Typical portfolio:





Group Benefits & Pension Consulting

Group Benefits

With the rising cost of Group Benefits, companies and non-profits are looking to hold the line on expenses while providing employees proper advice and service. ***Bridgeview Wealth Management*** makes this possible by fully understanding each client's situation, recommending the best alternatives, and assisting in managing the implementation and service for each plan.

Pensions & 401k Plans

Our pension specialists have experience in both compliance and administrative aspects of pension plans. Additionally, our financial analysts will create and monitor a proper blend of investment options. ***Bridgeview Wealth Management*** provides our pension clients advice, at both the company and employee level, while granting them access to all of our other diversified services.

Committed to your Success

Bridgeview Wealth Management offers its advice through MPS LORIA Financial Planners, LLC, an independent, experienced financial planning firm committed to understanding each client's unique needs. Our program consists of professionals who specialize in the disciplines of:

- Financial, Estate, Business and Tax Planning
- Retirement Planning and Roll-Over Options
- Asset Management and Research Analysis
- Group Benefits and Cafeteria/Section 125 Plans
- Pension and 401k Plans
- Insurance Planning

For additional information on the details and benefits of our Wealth Management Services, please consult a Personal Banker, visit us online at www.bridgeviewwealthmanagement.com or call 630-323-2144.