

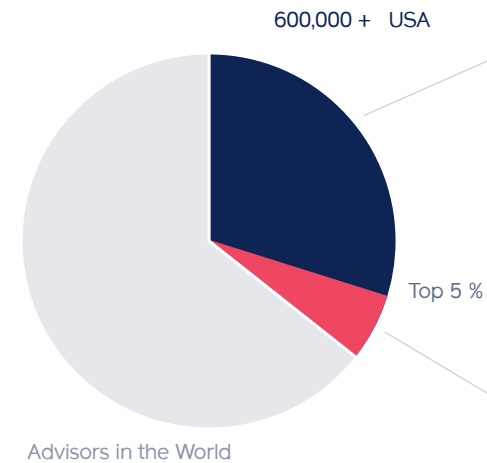
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Are you _____ getting the right financial advice?

INTRODUCTION

There are more than **600,000+**
Advisors in the United States.



Moenio helps you navigate the client-advisor relationship,
and improve understanding and confidence in how your
interests and wealth is being managed.

*Is your Advisor among the **best**?*

INTRODUCTION



Are you getting the right financial advice?

How we serve our clients.

At **Moenio**, we recognize the difficulty of finding the right financial advisor or evaluating an existing advisor. How do you know an advisor is among the best, delivering the great service and performance you deserve?

Capitalizing on decades of wealth management experience and expertise, **Moenio** created a proprietary evaluation process that provides clients unsurpassed guidance in finding, evaluating and monitoring their financial advisor.

Let us show you how we can help.



Find.



Evaluate.



Monitor.

Finding an Advisor.

How do you make the right choice?

When choosing an advisor, you face a number of important choices. Finding the best match requires asking the right questions to gain insight into an advisor's investment approach, return performance, credentialed expertise, fees, experience, size and scope of practice, type of clients, and more.

Moenio capitalizes on its expert knowledge of the industry to find the right advisors and firms, tailoring each search to our client's need and goals.



Find.



Second Step Contact Firms

Reach out to the firms agreed upon to find their top advisors. Use the client profile as a guide for selection.

Goal



Fourth Step Meet the right advisor

In a more thorough interview process we introduce the client to the advisors where we examine fees, investment decisions, the financial planning approach, and more to find the right Advisor.

Goal



Finding an Advisor.

How do you make the right choice?

When choosing an advisor, you face a lot of choices. Finding the best match requires asking the right questions to gain insight into an advisor's approach, return performance, credentials, fees, experience, size and scope of practice, and more.

Moenio capitalizes on its expert knowledge to find the right advisors and firms, tailored to our client's need and goals.



Finding an Advisor.

First Step

Meet with the Client

- Understanding the Client:
- Desired location of Advisor
 - Past advisor experiences
 - Expertise required
 - Family dynamics
 - Client goals

And more to create the right profile so the firms and their advisors will have clarity on the needs of our client.

Goal



Third Step

Narrow from Ten to Top 3 Advisors

Conduct an in-depth evaluation examining performance (1, 3, 5 year returns), investment process, advisor/team credentials, and expertise.

Goal



Second Step

Contact Firms

Reach out to the firms agreed upon to find their top advisors. Use the client profile as a guide for selection.

Goal



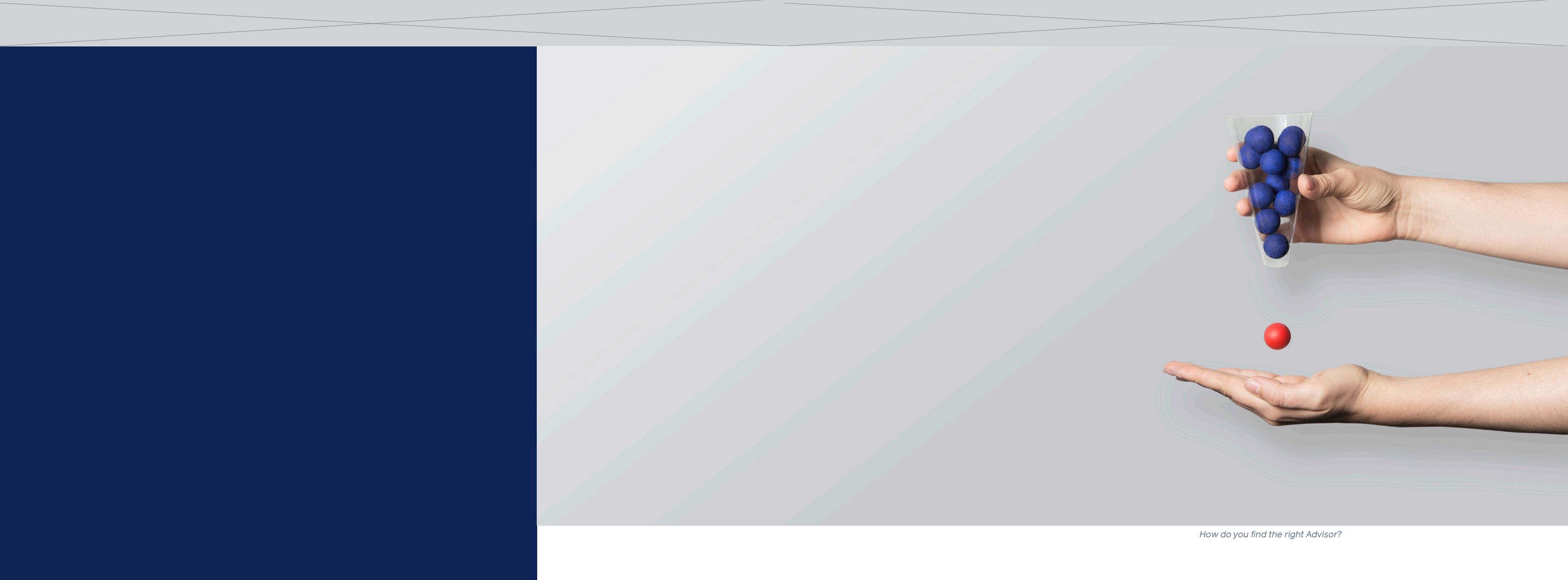
Fourth Step

Meet the right advisor

In a more thorough interview process we introduce the client to the advisors where we examine fees, investment decisions, the financial planning approach, and more to find the right Advisor.

Goal





How do you find the right Advisor?

Which Financial Advisors are Best?



Moenio values excellence across four aspects of an advisor's practice:



Consistency

The **Best Advisors** deliver consistent advice focused on meeting or exceeding the goals and needs of their clients, not merely "beating the market."



Communications

The **Best Advisors** have open and patient interactions with their clients, resulting in both the client and advisor having a clearer understanding of the issues and challenges faced. Clients leave advisor meetings with increased clarity and confidence.



Fairness

The **Best Advisors** provide service at a fair value—fees reflect the level of service and performance, not solely the amount of managed assets.



Proactivity

The **Best Advisors** are proactive, not reactive. They anticipate and address needs and concerns to save their clients time and money, and reduce stress.



Evaluating Your Current Advisor

Do you have doubts about your advisor?

Perhaps you are happy with your advisor, but would benefit from an outside expert providing objective feedback to validate what seems right and identify areas for improvement.

Using our Client-Advisor Assessment Report, Moenio rates your advisor on 15+ areas of their practice with a focus on how the results relate to your needs and goals.

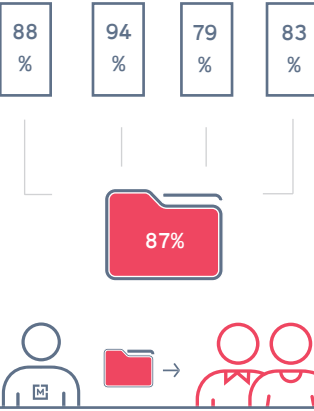


Evaluate.

Info

Client

Score



Deliver to the client our proprietary, four-step report covering 15+ areas of an advisor’s practice with actionable recommendations.

Report



Evaluate Your Client Advisor

Do you

Perhaps
outside of
right and

Using our
your advisor
how the

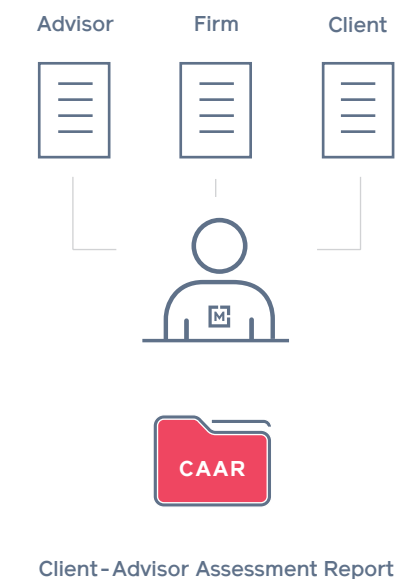


Evaluate

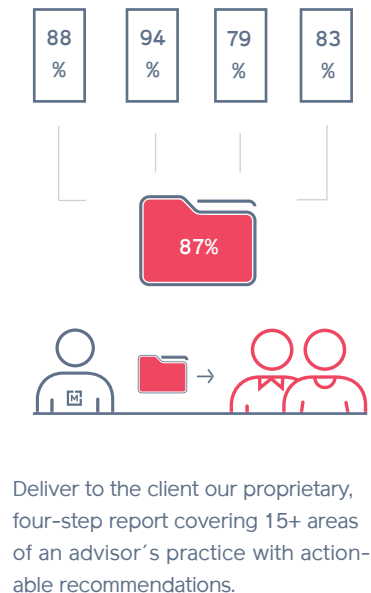
Meet with Client

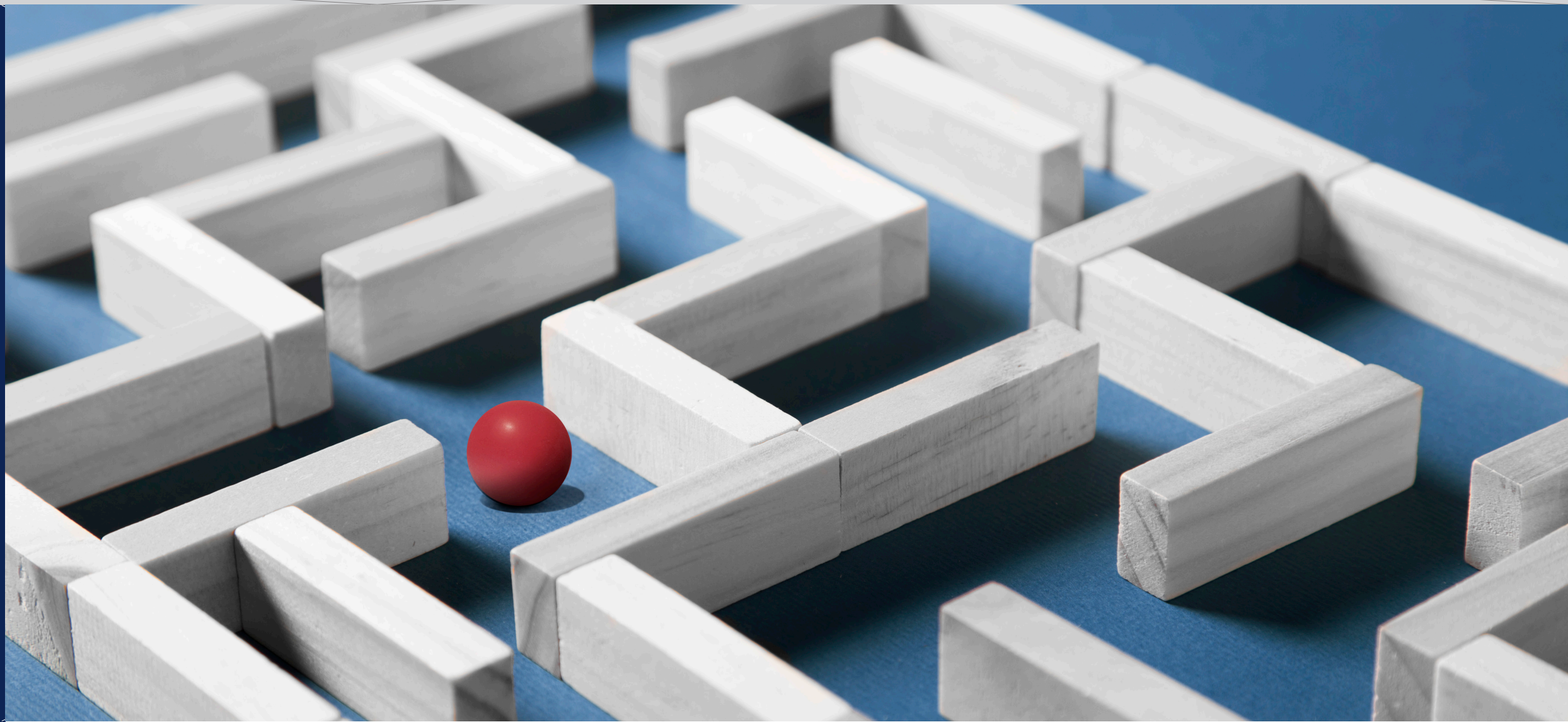


Moenio Gathers Info



Score





How do you evaluate your Advisor?

How does Moenio evaluate an Advisor’s investment methods & performance?



Investment performance is central to a comprehensive evaluation of an Advisor’s services, and a key component of our Client – Advisor Assessment Report. We begin this investment analysis with four key questions:

- 1 .

Has portfolio performance met or exceeded the goals and benchmarks over one-year, three-year and five-year periods?
- 2 .

Were appropriate benchmarks established and communicated?
- 3 .

Did the advisor adhere to a disciplined investment methodology?
- 4 .

Has performance been consistent across market conditions?

This core investment analysis guides Moenio to investigate further where needed, to better understand the causes and consequences of the Advisor’s investment decisions, and provide greater context to results.



Ongoing Monitoring.

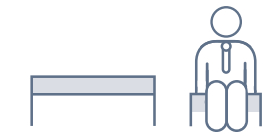
Are you comfortable with your
advisor but need help understanding
your advisor's decisions and the
performance delivered?

Moenio bridges the gap.



Monitor.

Monitor and explain my
performance. Someone sitting



side of the table during
or monitoring your performance,
ns needed to address concerns
isions that have a lasting impact

On Mo



MONITOR

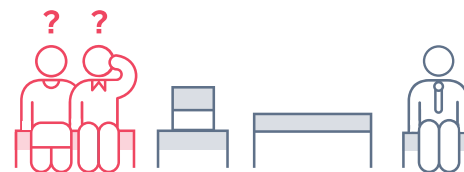
Concerns we often hear:

"I don't understand what my advisor is showing me."

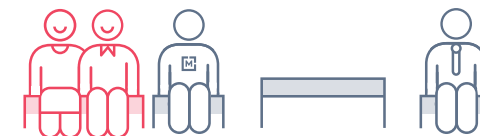
"I thought my returns were better, what happened?"

"I really like my advisor but communication should be better."

"I don't believe my advisor truly understands my needs."



"I need someone who can monitor and explain my advisor's decisions and performance. Someone sitting on my side of the table."



Whether sitting on your side of the table during client-advisor meetings or monitoring your performance, we ask insightful questions needed to address concerns and shed light on the decisions that have a lasting impact on your wealth.



*Who's helping you monitor and protect decisions
being made on your behalf?*

ABOUT

About Moenio.

Moenio was founded with one goal in mind:

Helping individuals, families, and organizations work with their advisors and advisory firms to better navigate the complexities of wealth.



Your interest is our sole interest.

A wide-angle landscape photograph showing a dirt path with wooden railings leading down a grassy hill. In the background, there is a large blue lake, a small town, and rolling green hills under a blue sky with white clouds.

Moenio —
Helping our clients
find the right path.

Moenio -

Helping our clients
find the right solutions.

We do not manage assets.
We are not financial advisors.

