June, 2025

FRESH ADVICE

THIS IS WHAT WE DO

FRESH ADVICE FROM THE PITON WEALTH TEAM



Michelle A. Clary, CFP®, ChFC®, CLU®, RICP®, AEP®, CEO of Piton Wealth



As the Piton team reflects on the 25th anniversary of the firm and looks ahead to the future of client service in wealth management, this summer becomes the perfect time to spotlight and clarify what Piton does professionally and the Piton perspective on why we do what we do and only what we do.

THE TWO SERVICES OF PITON WEALTH

Piton is a wealth management firm that offers two services, so that our team can focus on delivering the absolute best quality of those services to our clients. Our team specializes in holistic financial planning for clients of high net worth. At that level of financial complexity, professional advice and planning can make a crucial financial difference. Typically, a Piton client has $250,000 or more in investible assets. Beyond those investments, the goal of Piton's service is to have the entirety of a clients' assets planned and oriented toward achieving the client's unique life goals and aligned with their unique values.

To support these financial planning and advice services, Piton has developed unique tools and processes in-house, such as the trademarked Navigated Journey ™ (https://pitonwealth.com/our-process/), which maps out the stages of ongoing financial plans. Team members will also work with clients through exercises such as the Wheel of Wellness (https://pitonwealth.com/fresh-advice-04-23/), "values discovery," and others that go into developing plans which address every aspect of a client's wellness to help ensure that the plans align with clients' values and life goals, for themselves, their loved ones and causes they are passionate about.

FINANCIAL PLANNING AND ADVICE

Piton's own core values include acting as Fiduciaries. This means our team members have a professional commitment to acting strictly in the financial best interests of clients. At Piton, advisors do not sell products. Piton advisors might recommend products, but only because they are in the best financial interest of a client. The Piton team strives to earn its fees from the quality of planning and advice tailored to each client.

INVESTMENT MANAGEMENT

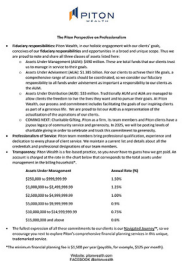
The other specialized financial service that Piton provides clients is Investment Management. This service refers to the active management of assets that clients have Piton manage. Piton has designed a set of portfolios that advisors can use to help maximize the client's desired balance between security, risk and growth. Piton has its own internal investment committee that manages and updates these in-

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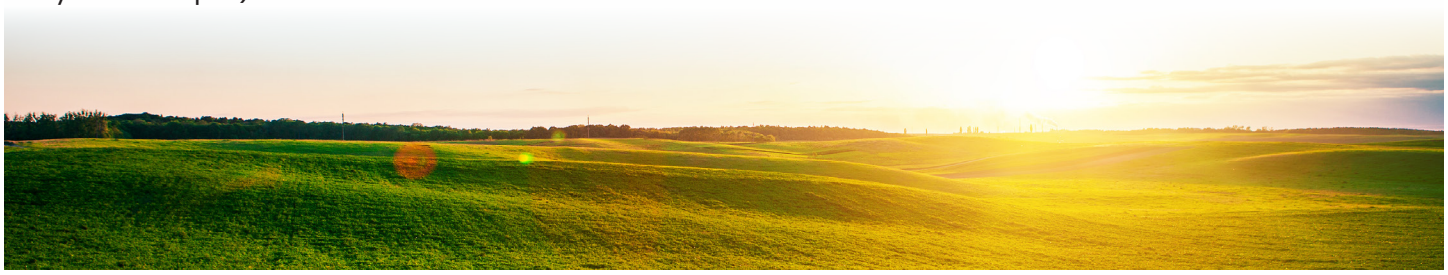
FRESH ADVICE FROM THE PITON WEALTH TEAM

vestments regularly, measured against professional benchmarks.

Separate from financial planning, Piton collects a fee for investment management as a percentage of assets managed. The fee structure for investment management is transparent and public. You can request this information at any time or simply consult it online at our website (https://pitonwealth.com/wp-content/uploads/2024/12/Piton-Perspective-on-Fiduciary-Responsibility-and-Transparency-2025-01.pdf). Because fees derive from the amount of assets invested, Piton's compensation remains aligned with client goals of increasing their assets. Additionally, Piton's most important pursuit on behalf of clients is value as described by client return net of fees (https://pitonwealth.com/fresh-advice-12-24/).



Both of these financial service components and our team's commitment to unmatched dedication to client service mean that every plan, and its recommendation, serves clients' life goals, especially those of life in retirement, securing the best support for loved ones across multiple generations, and helping maximize the impact of charitable giving that further extend the reach of a client's values.



QUIZ **What TWO are the main services that Piton Wealth provides?**

a. accreditation of fiduciaries
b. sales of insurance policies
c. Investment Management
d. Financial Planning and Advice

Thank you!

Thank you! The Piton team will be back with more Fresh Advice in June! Fresh Advice will begin its fourth year with plenty of fresh excitement!

Visit pitonwealth.com/learning for videos and more free information

CAN YOU FIND the HIDDEN PITON?

A piton is a tool which mountain climbers use to secure a hold and climb higher than they could have otherwise. That is why we are Piton Wealth, to advise clients so they climb to ever higher goals. Comprehensive financial planning is the dedicated tool that the Piton team uses for clients to achieve those goals. The ultimate goal is a fulfilling and generous life. The Piton team hopes to see you as part of that life at one of Piton's community events, or any of the many life-affirming events in our communities, and we would love to talk to you about a plan, so please reach out to us when you want to find out about a potential Navigated Journey for you and your loved ones.

If you are interested in Piton Wealth's services, call (509) 582-0570 or visit pitonwealth.com/request-an-appointment/

We hope to hear from you!

ANSWERS: c & d. You can see the piton on page 1 1st column first sentence

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