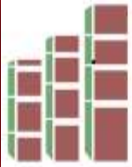


Quick Facts



Professional Planning Coordination Services, LLC ("PPCS")

"Elevate & Differentiate Your Client Service Offerings"

ELEVATE & DIFFERENTIATE YOUR LAW, CPA OR FEE ONLY RIA PRACTICE BY BECOMING A PPCS LICENSEE IN YOUR COUNTY AND OFFERING . . .

Professional Planning Coordination Services ("PPC Services") to your Individual⁽¹⁾, Family⁽¹⁾, Business Non-Profit, Trust and Estate Administration Clients.

AS A PPCS LICENSEE YOU WILL:

- Earn repetitive premium hourly income, by delivering PPC Services to your clients.
- Possess your own Practice Management Portal System.
- Provide secure 24/7 Portal Service to your best clients.
- Provide seven (7) different PPC Services to your Individual, Family, Business, Non-Profit, Trust and Estate Administration Clients.
- Have access to twenty-five (25) PPC Services Marketing Programs, all designed to increase your business from existing clients, new clients and Centers of Influence.
- Build your business referral relationships with Centers of Influence.

To learn more about our PPC Services and procuring a PPCS License for your County:

- Visit our Website: www.ProfessionalCoordinator.com
- Email: Admin@ProfessionalCoordinator.com
- Phone: (866) 998-2737 Ext. 5

⁽¹⁾ Individual & Family Clients must have a Financial Plan prepared and delivered by a Certified Financial Planner - CFP®.

You Market • We Prepare • You Deliver

SEVEN PROFESSIONAL PLANNING COORDINATION SERVICES

THREE INFORMAL PPC SERVICES

- **Client PPC Service "Lite"**
(One "Lite" Meeting/Year)
- **Client Portal PPC Service** with Single Sign-On Portal access to: Investment Portfolio Asset Tracking and Performance Reporting, Document Vault & Financial Plan, if available. *(No Meetings Required)*
- **Client PPC Service "Lite" & Client Portal PPC Service – Combined** *(One "Lite" Meeting/Year)*

FOUR FORMAL PPC SERVICES (Includes the Informal Client Portal PPC Service)

- **Basic PPC Service**
One Planning Meeting Per Year
- **Lifetime PPC Service**
Two Planning Meetings Per Year
- **Enhanced PPC Service**
Three Planning Meetings Per Year
- **Comprehensive PPC Service**
Four Planning Meetings Per Year

Each Formal PPC Service includes:

- Secure Portal access with uploaded planning documents.
- Investment Portfolio Asset Tracking and Performance Reporting.
- Sophisticated Turnkey PPC Service Planning Meeting Agendas containing Advisors' current judgments, observations and recommendations regarding Agenda Planning Topics assigned to them.
- Planning Meeting Binder containing Advisors' judgments, observations and recommendations on planning topics assigned to them, Advisor prepared