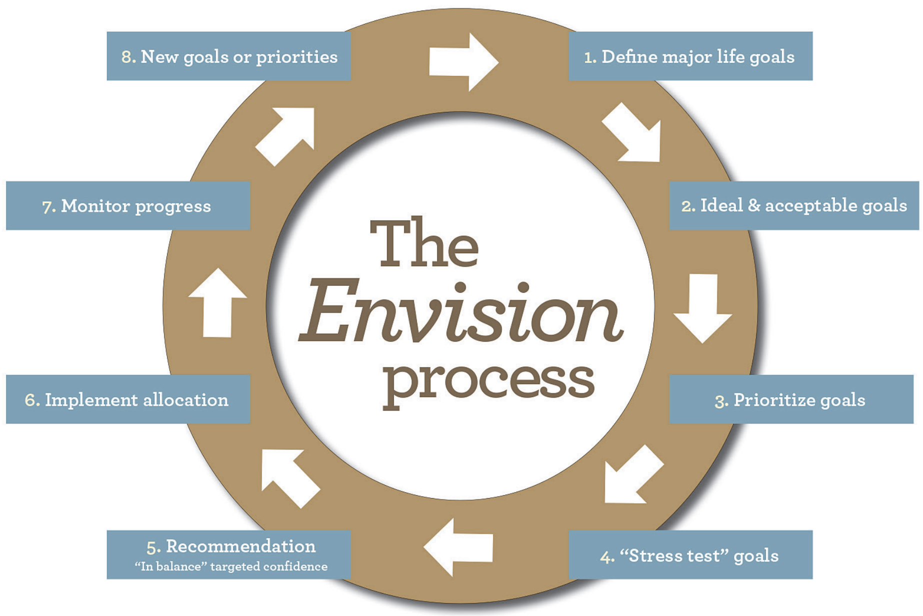
Our Advisory Process

At The Gorton Wealth Management Group, we are committed to working with you to maximize your investments to meet your personal life goals. This means spending time with you, listening and preparing a detailed financial framework that outlines current strategies, and analyzing various options to construct an investment strategy that takes into account your objectives as well as your risk tolerance.



Envision® Investment Plan: The *Envision* Planning process is the engine of our client's financial advisory plan. Once we have gotten a detailed look at your circumstances, and have a shared vision of where you want to be, we can then begin to "stress test" your investment goals through the *Envision* tool. Our *Envision* Analysis will take a thousand different historical market scenarios and stress test your set of goals to determine our chances of success. Based on your priorities and preferences, we can adjust certain aspects of your plan to help ensure your success. You can be assured that the proposed strategies reflect your financial objectives and desires, and that they are coordinated with your stage in life as well as the dynamics of the current marketplace.

Portfolio Allocation: Once we understand your personal circumstances and the goals you seek to accomplish, we are able to develop a tailored asset allocation strategy for your family that encompasses your risk tolerance and time horizons. The *Envision* process gives us the ability to monitor your progress towards your goals, and make the necessary changes to your allocation as market conditions or life's circumstances dictate.

Implementation: We will deploy assets into your allocation over a mutually agreed upon time frame that takes into account current market and economic conditions.

Monitor Progress: In addition to your monthly statements, you will receive quarterly performance reports that update your progress. Additionally, we will consistently monitor your *Envision* Plan Result to ensure that we are staying on track to meeting your goals.

Review Meetings: While we always want to be available to our clients to answer questions or discuss their portfolios, we feel it is important that we get together to review their financial advisory plan at least annually, and in most cases more frequently than that. We will work with you to determine a schedule you are most comfortable with.

Please see important disclosures on reverse.

Michael Gorton
Managing Director - Investment Officer

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IMPORTANT:

The projections or other information generated by the Envision tool regarding the likelihood of various investment outcomes are hypothetical in nature, do not reflect actual investment results and are not guarantees of future results. Results may vary with each use and over time.

Envision methodology: Based on accepted statistical methods, the Envision tool uses a simulation model to test your Ideal, Acceptable and Recommended Investment Plans. The simulation model uses assumptions about inflation, financial market returns and the relationships among these variables. These assumptions were derived from analysis of historical data. Using Monte Carlo simulation, the Envision tool simulates 1,000 different potential outcomes over a lifetime of investing varying historical risk, return, and correlation amongst the assets. Some of these scenarios will assume strong financial market returns, similar to the best periods of history for investors. Others will be similar to the worst periods in investing history. Most scenarios will fall somewhere in between. Elements of the Envision presentations and simulation results are under license from Wealthcare Capital Management, LLC.