WEALTH · COAST

BRAND SUMMARY

Northwestern Mutual
Wealth Management Company®

BRAND PILLARS

BRAND STORY

THOUGHTFUL GUIDANCE
THROUGH ALL OF LIFE'S JOURNEYS

We know who you are. You wanted to chart a new course and create your own success. You learned how to steer through uncertainty and naturally stepped into a leadership role. After all, someone must navigate, coordinate teams, and make the tough calls in an ever-changing modern environment.

And you've done it. You've saved well, paid off debt, taken care of your family, made smart choices throughout your career, or started a profitable business... you've built the successful life you wanted. But you realize the next part of your journey might be beyond your ability to navigate alone. You end up finding yourself in deeper uncharted territory with a constant voice in the back of your mind asking:

"What am I Missing?"

BRAND STORY

At Wealth Coast, we guide busy entrepreneurs and professionals to a calm, clear path to reaching their goals. We know along the way there will be rough patches and even times when it feels like there is no sure route ahead. Whether it's uncertainty with taxes, market volatility, or simply not wanting to outlive your hard-earned assets, we help soothe those fears with the ease and surety that comes from our decades of experience. We want our clients to make their wealth a force of good instead of a source of worry.

Working collaboratively with your CPA, Attorney, and other trusted advisors, we will help you draw up the map for what's coming next and navigate risk along the way. Delegating this work allows for more quality time with your family and friends, to explore the world of your passions and interests, and to experience life in the ways you care about most.

Why steer the ship alone when you could have a crew do it for you? Let us take the wheel while you enjoy the view.

BRAND TAGLINE

Northwestern Mutual
Wealth Management Company®

WEALTH · COAST

BRAND LOGO

WEALTH · COAST

WEALTH MANAGEMENT
& INSURANCE SOLUTIONS

BRAND LOGO ALTERNATE FORMATS

REVERSE HORIZONTAL

WEALTH · COAST
WEALTH MANAGEMENT
& INSURANCE SOLUTIONS

BLACK AND WHITE VERTICAL

WEALTH · COAST
WEALTH MANAGEMENT & INSURANCE SOLUTIONS

FULL COLOR VERTICAL

WEALTH · COAST
WEALTH MANAGEMENT & INSURANCE SOLUTIONS

BRAND COLOR PALETTE

NAVY BLUE
CMYK: 42, 20, 0, 52
HEX #0E497B

LIGHT BLUE
CMYK: 43, 11, 0, 5
HEX #83D4F1

GRAY
CMYK: 2, 1, 0, 5
HEX #EDF0F3

LIGHT GRAY
CMYK: 2, 1, 0, 1
HEX #F8FAFC

BRAND TYPOGRAPHY

The primary typeface for Wealth Coast is Proxima Nova. This typeface should be used for informational text, headings and body copy as outlined below. Special effects such as condensing, extending, underlining or drop shadows should not be used.

Proxima Nova Black

ABCDEFGHIJKLMNOPQRS TUVWXYZ abcdefghijklmnopqrstuvwx yz 123

Proxima Nova Thin

ABCDEFGHIJKLMNOPQRSTU VWXYZ abcdefghijklmnopqrstuvwxyz 123

BRAND MATERIALS

STATIONARY

WEALTH · COAST

Date

Dear Name,

Thank you for your interest in our services. If engaged, it will be our *fiduciary* responsibility to gain clarity with regard to your family's current situation and in relation to your primary planning objectives. I trust the following will be helpful to you as we begin to work with you on developing a comprehensive financial plan.

As a follow-up to our in-depth discovery process, we will complete a Personal Planning Analysis that illustrates your current and projected financial situation regarding retirement, education funding, asset allocation, cash flow, taxation, survivorship, and disability income. We will provide detailed recommendations and work with you on plan implementation once complete.

We look forward to working with you on this important project, and we are confident you will receive tremendous value from our expertise, thoroughness, and guidance. Please feel free to contact us if you have further questions or need more clarity.

Sincerely,

Joshua D. Buttrey, CFP®, RICP®, CLU®
Co-Founder, Wealth Management Advisor
Wealth Coast

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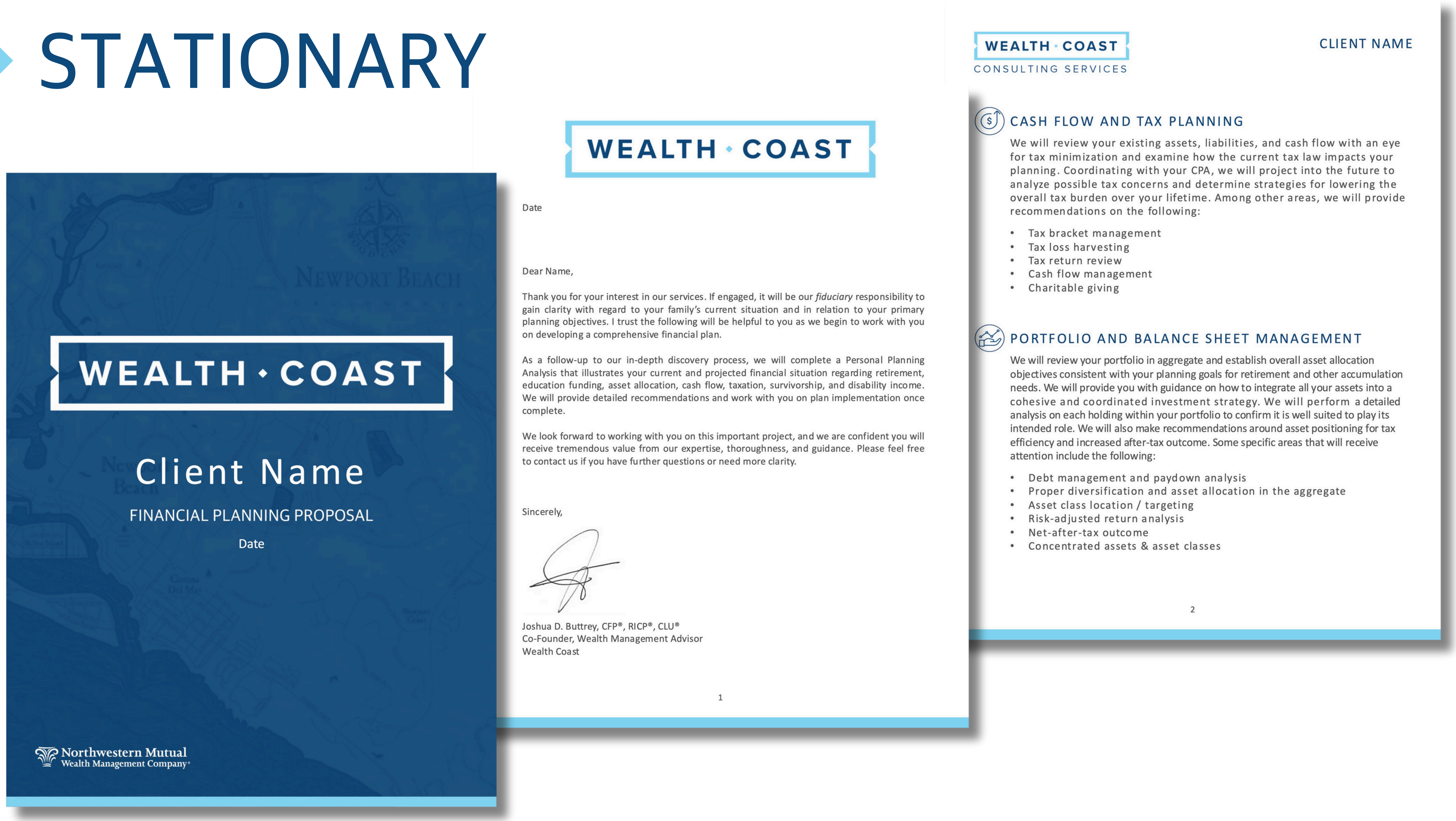
STATIONARY



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Client Name

FINANCIAL PLANNING PROPOSAL

Date

Northwestern Mutual
Wealth Management Company®

WEALTH · COAST

Date

Dear Name,

Thank you for your interest in our services. If engaged, it will be our *fiduciary* responsibility to gain clarity with regard to your family's current situation and in relation to your primary planning objectives. I trust the following will be helpful to you as we begin to work with you on developing a comprehensive financial plan.

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Sincerely,

Joshua D. Buttrey, CFP®, RICP®, CLU®
Co-Founder, Wealth Management Advisor
Wealth Coast

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WEALTH · COAST
CONSULTING SERVICES

CLIENT NAME

CASH FLOW AND TAX PLANNING

We will review your existing assets, liabilities, and cash flow with an eye for tax minimization and examine how the current tax law impacts your planning. Coordinating with your CPA, we will project into the future to analyze possible tax concerns and determine strategies for lowering the overall tax burden over your lifetime. Among other areas, we will provide recommendations on the following:

- Tax bracket management
- Tax loss harvesting
- Tax return review
- Cash flow management
- Charitable giving

PORTFOLIO AND BALANCE SHEET MANAGEMENT

We will review your portfolio in aggregate and establish overall asset allocation objectives consistent with your planning goals for retirement and other accumulation needs. We will provide you with guidance on how to integrate all your assets into a cohesive and coordinated investment strategy. We will perform a detailed analysis on each holding within your portfolio to confirm it is well suited to play its intended role. We will also make recommendations around asset positioning for tax efficiency and increased after-tax outcome. Some specific areas that will receive attention include the following:

- Debt management and paydown analysis
- Proper diversification and asset allocation in the aggregate
- Asset class location / targeting
- Risk-adjusted return analysis
- Net-after-tax outcome
- Concentrated assets & asset classes

2

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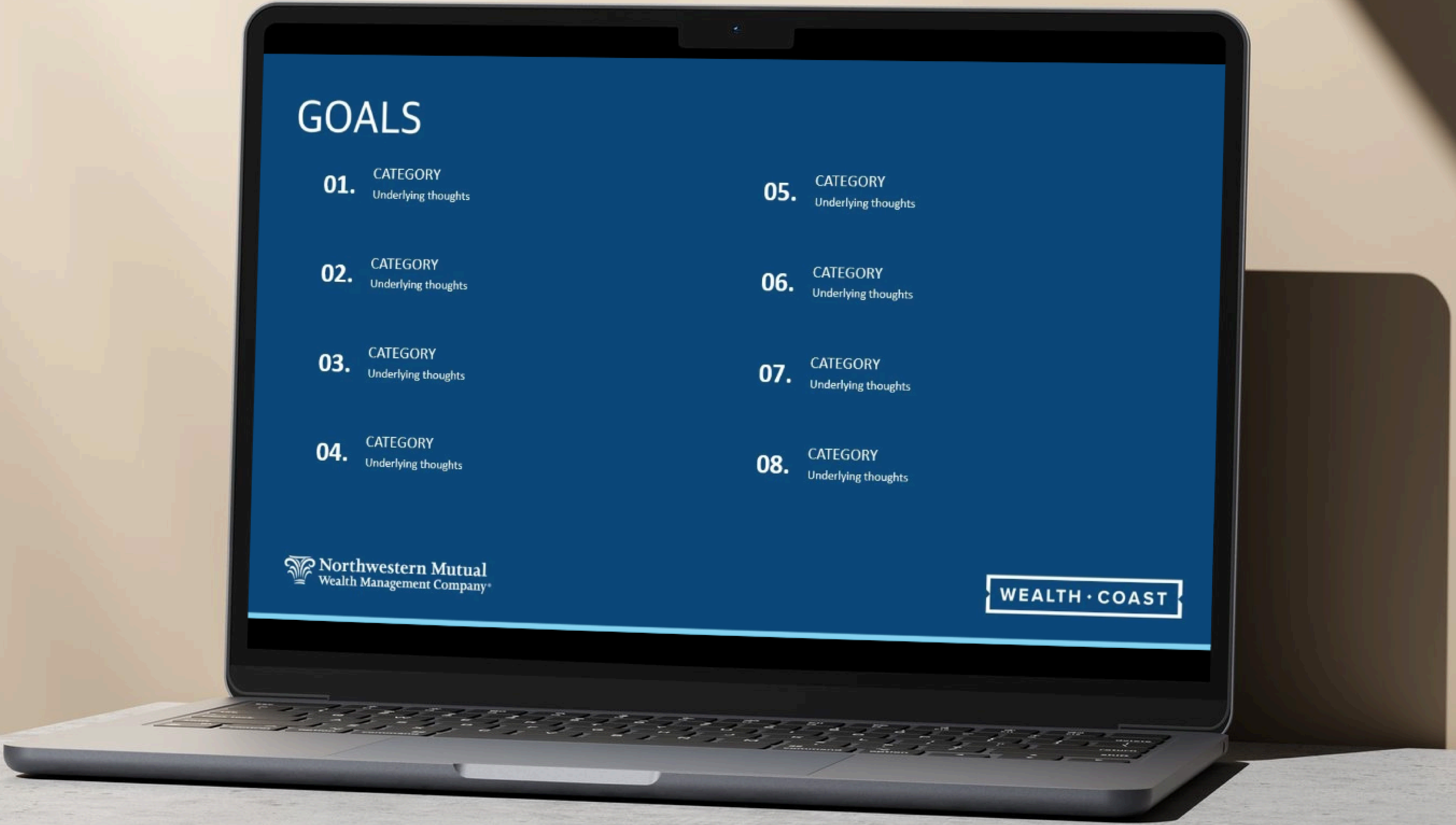
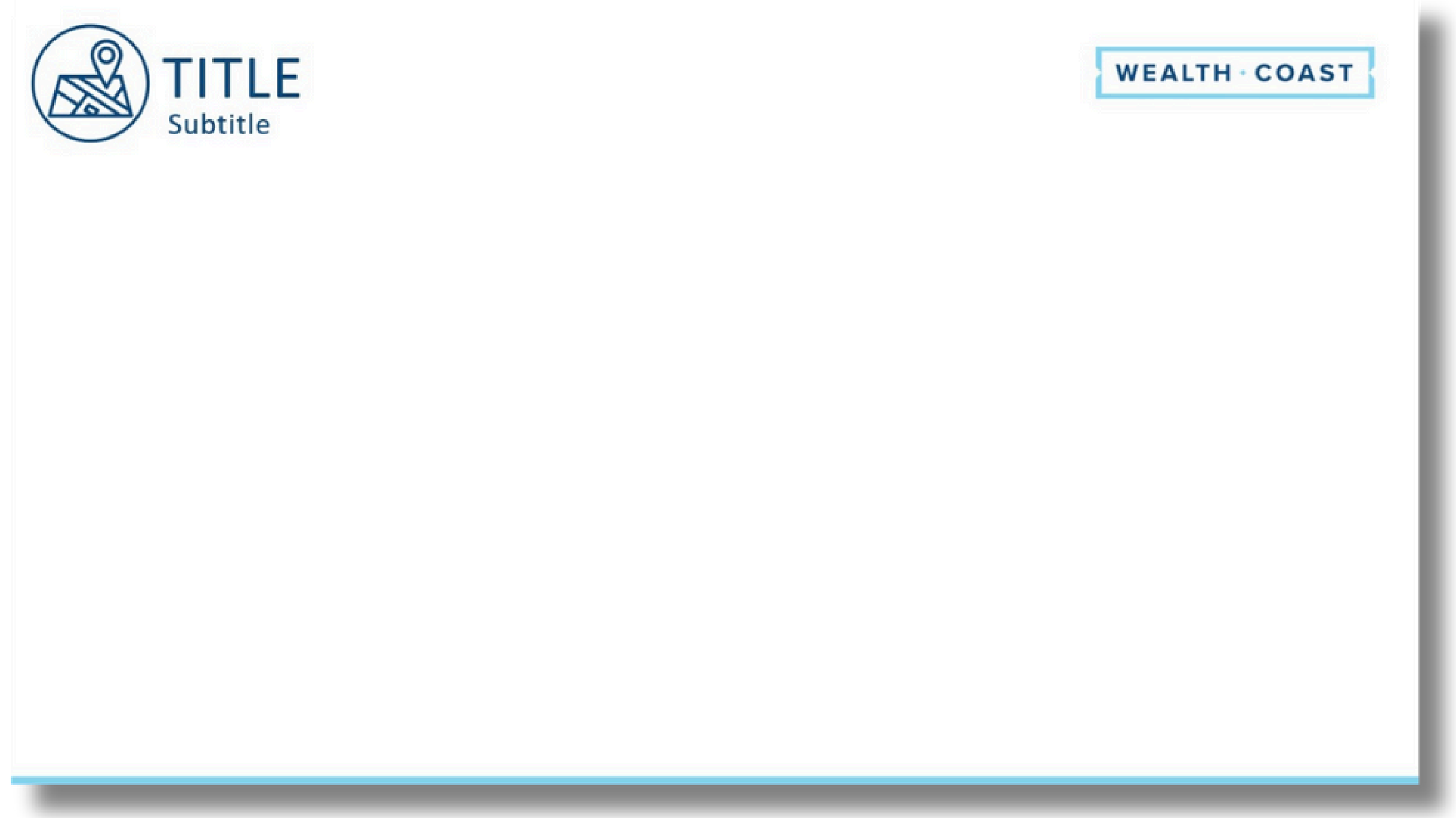
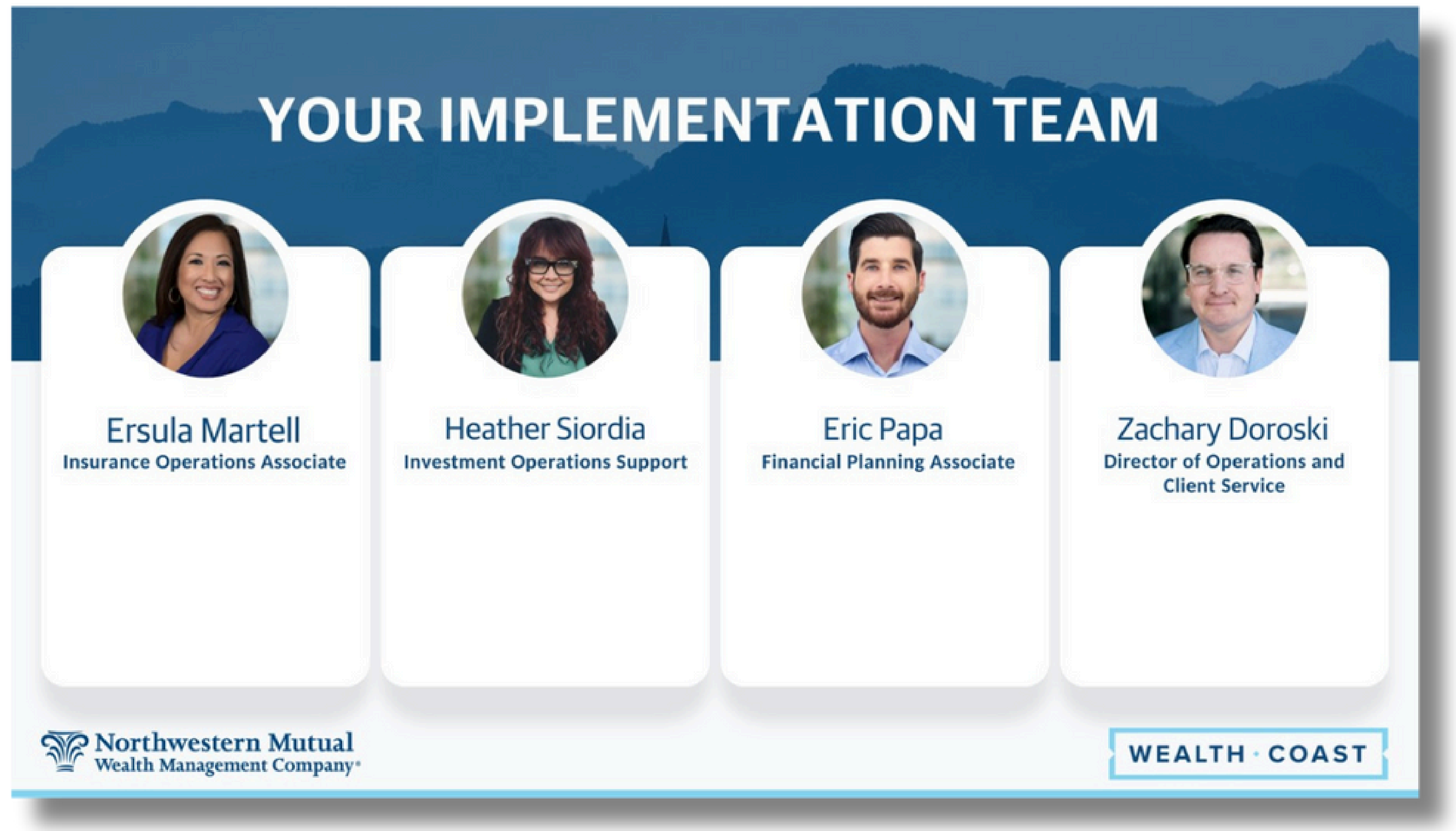
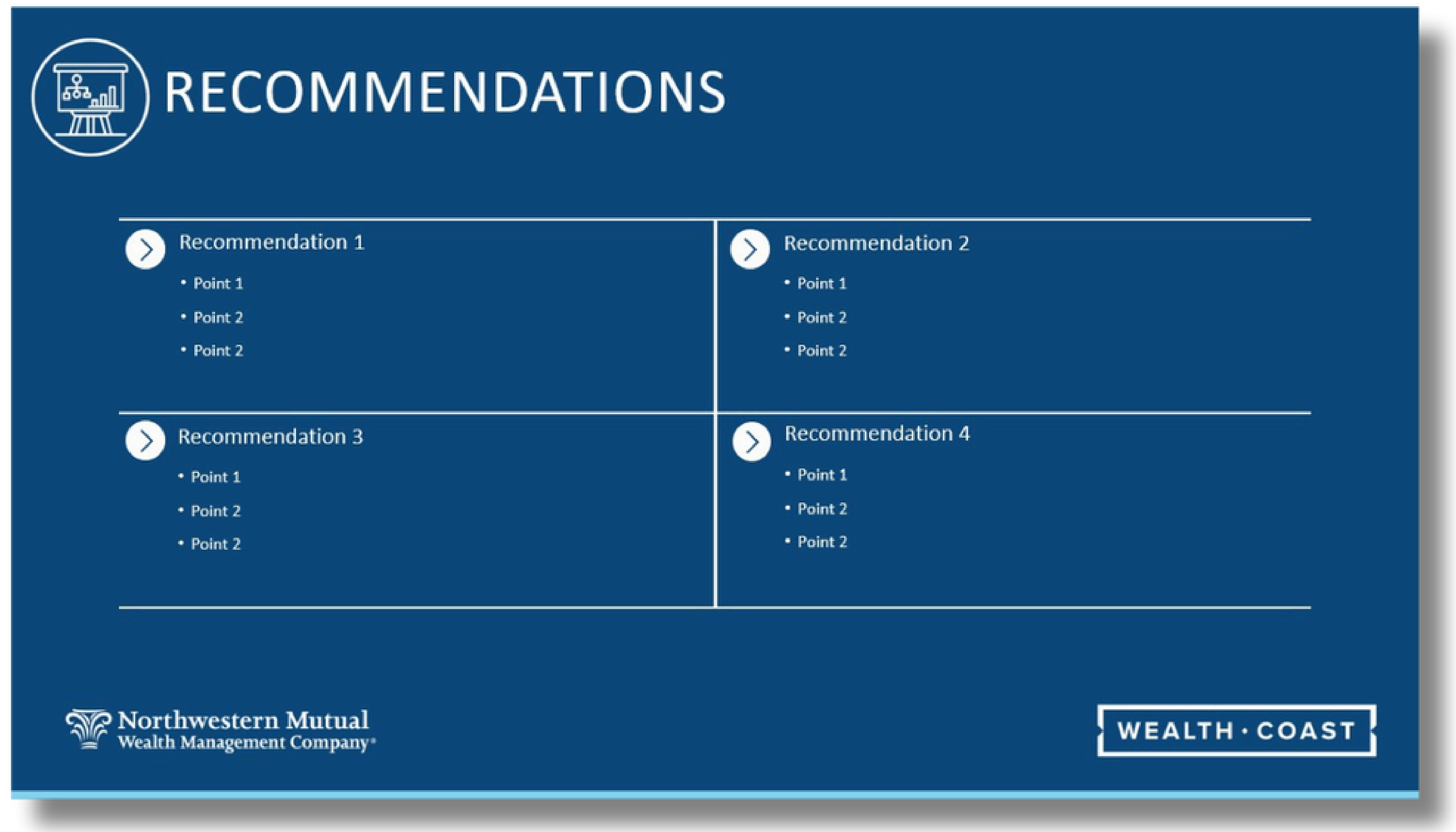
PRESENTATION DECK



PRESENTATION DECK







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◆ EMAIL SIGNATURES

EMAIL SIGNATURES

WEALTH · COAST

WEALTH MANAGEMENT & INSURANCE SOLUTIONS

Joshua Buttrey, CFP®, RICP®, WMCP®, CLU®
Co-Founder | Wealth Management Advisor
1500 Quail Street, Suite 600 I Newport Beach, CA 92660

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WEALTH MANAGEMENT & INSURANCE SOLUTIONS

Tyler Terry, CLU®
Co-Founder I Wealth Management Advisor
1500 Quail Street, Suite 600 I Newport Beach, CA 92660

SOCIAL ASSETS - LAUNCH POST

SOCIAL ASSETS - LAUNCH POST SERIES

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SOCIAL ASSETS - LINKEDIN BANNER

CLIENT COMMUNICATION

CLIENT COMMUNICATION

Monthly Budget

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WEALTH-COAST.COM

Your monthly budget is an important part of your personalized plan. To help your advisor create a strategy just for you, share it when you're finished. This is the first step to planning for the life you want.

Name

Monthly Fixed Expenses

HOUSING
- Mortgage/Rent $
- Property Taxes $
- Home Maintenance $
- Homeowner's/Renter's Insurance $
- Utilities (electric, gas, water, etc.) $
- Phone/Cable/Internet $
- Other $

Total Housing $ 0

OUT-OF-POCKET HEALTH CARE/INSURANCE
- Health Insurance $
- Life Insurance $
- Disability Income Insurance $
- Long-term Care Insurance $
- Copayments/Coinsurance $
- Prescription Medication $
- Other $

Total Health Care/Insurance $ 0

TRANSPORTATION
- Auto Payment(s) $
- Auto Insurance $
- Gas/Parking/Tolls $
- Maintenance/License $
- Public Transportation $
- Other $

Total Transportation $ 0

HOUSEHOLD/PERSONAL
- Groceries $
- Personal Care & Fitness $
- Dry Cleaning $
- Other $

Total Household/Personal $ 0

PERSONAL LOANS
- Student Loans $
- Credit Card Debt $
- Other $

Total Personal Loans $ 0

RAISING CHILDREN
- Dependent Care/Child Care $
- Education/School $
- Other $

Total Raising Children $ 0

FIXED EXPENSES SUBTOTAL $ 0

Monthly Discretionary Spending

- Dining Out $
- Monthly/Annual Subscriptions $
- Shopping $
- Entertainment $
- Vacations $
- Gifts $
- Charitable Contributions $
- Other $

DISCRETIONARY SPENDING SUBTOTAL $ 0

Monthly Savings and Investment Contributions

- Emergency Fund $
- College Savings $
- Big Purchase Savings $
- Retirement Savings $
- Other $

SAVING AND INVESTMENT SUBTOTAL $ 0

FIXED EXPENSES SUBTOTAL	$ 0
DISCRETIONARY SPENDING SUBTOTAL	+ $ 0
SAVINGS AND INVESTMENT SUBTOTAL	+ $ 0
TOTAL MONTHLY OUTFLOW	$ 0

NET MONTHLY INCOME Enter what you take home each month.	$
TOTAL MONTHLY OUTFLOW	– $ 0
MONTHLY SURPLUS/SHORTAGE	$ 0

29-3914 (0922)

Northwestern Mutual

WEALTH · COAST WEALTH MANAGEMENT & INSURANCE SOLUTIONS

Clients, Friends, and Family,

We have exciting news to share! Our team is thrilled to announce the addition of a new partner, Timothy Mulroy. Effective May 1st, Tim joined the Wealth Coast Wealth Management & Insurance Solutions family.

Tim has over 20 years of financial planning experience and began his career with Northwestern Mutual as a college intern while double majoring in Marketing and Management at Mansfield University of Pennsylvania. He's spent time devoted to leadership in Northwestern Mutual including a recently concluded 10-year run as the Managing Partner of Northwestern Mutual's Orange County office. He believes that true financial planning frees people up to spend their lives doing what they want, when they want, with who they want. His personal expertise is in working with closely-held business owners and ambitious professionals. He is passionate about continuing to educate himself and maintains the Certified Financial Planner ™ (CFP®) certification as well as the Chartered Financial Consultant (ChFC®), the Chartered Leadership Fellow (CLF®), and the Chartered Life Underwriter (CLU®) designations.

Tim's addition to Wealth Coast is a further commitment to our clients that we are here to help guide you through all of life's journeys and provide you with a clear path to reaching your goals. We know there will be rough patches along the way. Still, with our decades of collective experience, we will help map out what's coming next and navigate you through all the uncertainty and risk that comes with captaining your financial ship.

And remember, you never need to steer the ship alone; you have a crew to help you. Let Wealth Coast take the wheel so you can enjoy and experience life in all the ways that are important to you.

To learn more about our firm, team members, and expertise, visit us at our website: wealth-coast.com

If you have any questions, please ask! Don't close this email if there is something you want to say or ask. Just hit "Reply" and let me know what's on your mind.

Sincerely,

Tyler

1500 QUAIL ST, SUITE 600 I NEWPORT BEACH, CA 92660
wealth-coast.com

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Wealth Management Company®

WEALTH · COAST

BUDGET WORKSHEET

BUDGET WORKSHEET

Monthly Budget

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WEALTH-COAST.COM

Your monthly budget is an important part of your personalized plan. To help your advisor create a strategy just for you, share it when you're finished. This is the first step to planning for the life you want.

Name

Monthly Fixed Expenses

HOUSING

Mortgage/Rent	$
Property Taxes	$
Home Maintenance	$
Homeowner's/ Renter's Insurance	$
Utilities (electric, gas, water, etc.)	$
Phone/Cable/Internet	$
Other	$
Total Housing	**$ 0**

OUT-OF-POCKET HEALTH CARE/INSURANCE

Health Insurance	$
Life Insurance	$
Disability Income Insurance	$
Long-term Care Insurance	$
Copayments/Coinsurance	$
Prescription Medication	$
Other	$
Total Health Care/Insurance	**$ 0**

TRANSPORTATION

Auto Payment(s)	$
Auto Insurance	$
Gas/Parking/Tolls	$
Maintenance/License	$
Public Transportation	$
Other	$
Total Transportation	**$ 0**

HOUSEHOLD/PERSONAL

Groceries	$
Personal Care & Fitness	$
Dry Cleaning	$
Other	$
Total Household/Personal	**$ 0**

PERSONAL LOANS

Student Loans	$
Credit Card Debt	$
Other	$
Total Personal Loans	**$ 0**

RAISING CHILDREN

Dependent Care/ Child Care	$
Education/School	$
Other	$
Total Raising Children	**$ 0**

FIXED EXPENSES SUBTOTAL $ 0

Monthly Discretionary Spending

Dining Out	$
Monthly/Annual Subscriptions	$
Shopping	$
Entertainment	$
Vacations	$
Gifts	$
Charitable Contributions	$
Other	$
DISCRETIONARY SPENDING SUBTOTAL	**$ 0**

Monthly Savings and Investment Contributions

Emergency Fund	$
College Savings	$
Big Purchase Savings	$
Retirement Savings	$
Other	$
SAVING AND INVESTMENT SUBTOTAL	**$ 0**

FIXED EXPENSES SUBTOTAL	$ 0
DISCRETIONARY SPENDING SUBTOTAL	+ $ 0
SAVINGS AND INVESTMENT SUBTOTAL	+ $ 0
TOTAL MONTHLY OUTFLOW	$ 0

NET MONTHLY INCOME Enter what you take home each month.	$
TOTAL MONTHLY OUTFLOW	− $ 0
MONTHLY SURPLUS/SHORTAGE	$ 0

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◆ CLIENT EMAIL

WEALTH COAST