

Why Nick Sloane, ChFC, CRC Sloane Wealth Management



- 1 Fiduciary Responsibility – a legal duty to put your interests first
- 2 Comprehensive, Holistic and Unbiased Advice
- 3 Retirement Income Planning
- 4 Objective Investment Analyses
- 5 Cost-Effective Institutional Investments
- 6 Need-Based Asset Allocation Strategies
- 7 Broad Diversification
- 8 Daily Investment Tracking and Rebalancing
- 9 Fee Transparency
- 10 401k Investment Advice
- 11 Legacy Planning
- 12 Life Insurance, Annuity Reviews
- 13 No Complaints Ever to any Regulatory Authority
- 14 Chartered Financial Consultant (ChFC®) – Certified Retirement Counselor (CRC®)

The President's Council of Economic Advisers estimates that non-fiduciary advice costs Americans 1 percentage point of their return annually.

Sloane Wealth Management

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Investment Advisory Services are offered through Wealth Financial Advisory Services, LLC, a Registered Investment Adviser. Insurance and other financial products are offered through appropriately licensed and appointed individuals in various jurisdictions.