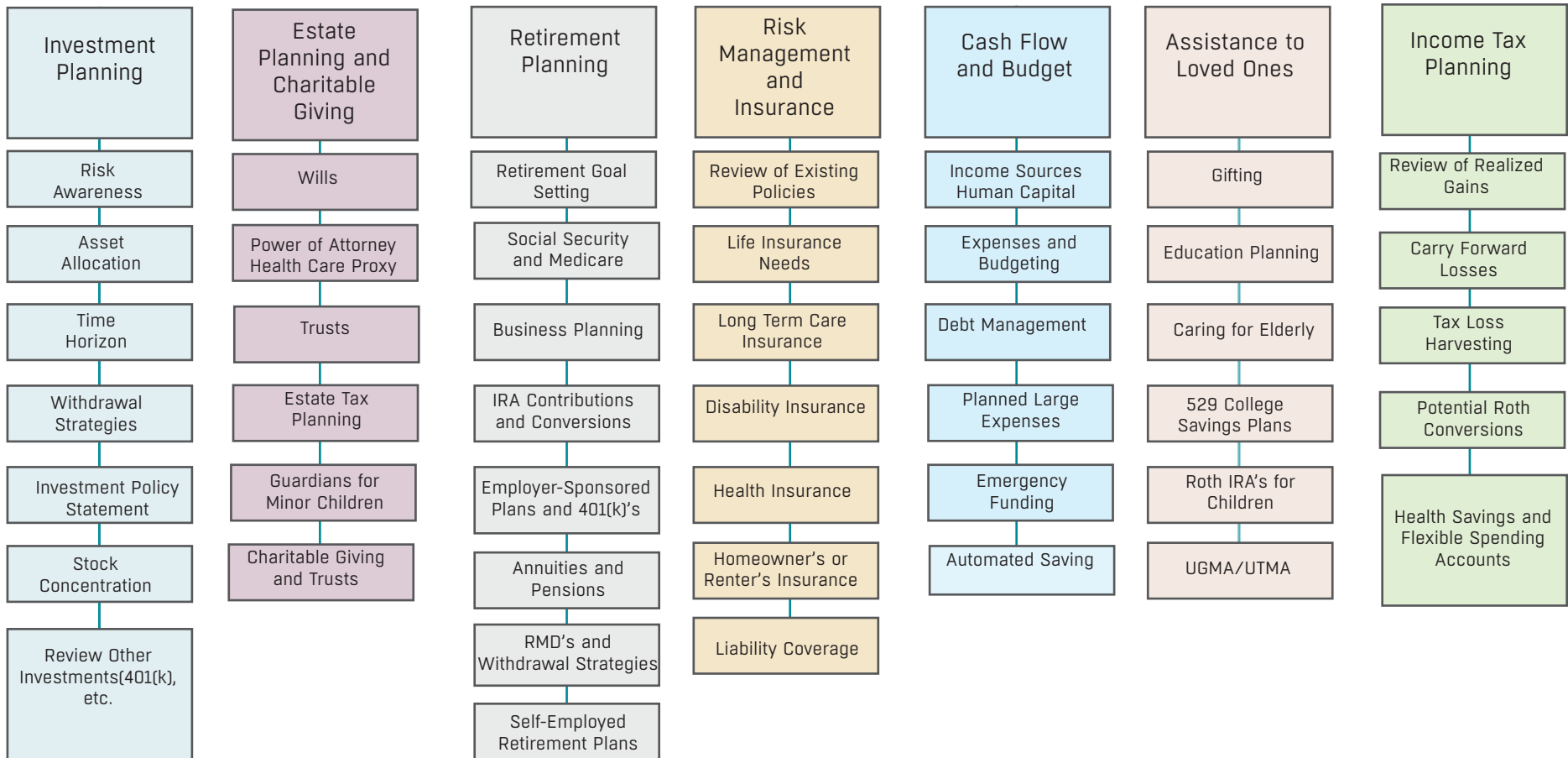


Uncovering Your Financial Blind Spots



Your Plan in Action

One-Page Financial Plan:

Goals-based financial planning with written summary of steps to take action now.

Your Quarterback:

Coordinate with other professionals* that you have selected, such as your attorney and accountant, so you can maximize personal time and focus.

See All Accounts Online:

No more multiple IRLs and passwords. Securely connect all your accounts for viewing and store important documents (insurance policies, legal documents, tax returns) in a secure online vault.

*Any referral made by Windgate Wealth Management to a professional does not imply a recommendation.



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