ACUMEN WEALTH ADVISORS®

REGISTERED INVESTMENT ADVISER

YOUR RELATIONSHIP WITH ACUMEN WEALTH ADVISORS
AN INDEPENDENT REGISTERED INVESTMENT ADVISER (RIA)

Acumen Wealth Advisors provides customized, active asset management integrated with financial planning. Our team helps successful families achieve their financial objectives through education, leveraging the latest technology, strategic planning, and frequent communication to build trust and strong client relationships. These fundamentals allow our clients to feel informed, confident, and secure.

We understand financial planning is a verb and not a noun. We engage our clients as their plans are executed and evolve. Acumen's commitment helps successful families stay successful.

Our team works to:

> **Understand and prioritize goals and objectives.**
> **Develop a summary of the current financial situation.**
> **Review current investment portfolio and develop an asset management strategy.**
> **Identify tax planning strategies to optimize financial position.**
> **Present a written financial plan to be reviewed in detail and execute on the plan with tools and resources including the latest portfolio management and financial planning tools.**
> **Monitor and track progress utilizing innovative tools and partnerships at our disposal.**
> **Work closely with our client's other trusted advisors to coordinate their comprehensive strategy.**

As fiduciaries regulated under the Investment Advisers Act of 1940, RIAs are held by law to the highest standard of responsibility to their clients. Under this fiduciary standard RIAs are, thereby, required to always act in their clients' best interests. Clients can expect this standard from their advisors and we continue to embrace this responsibility.

Acumen Wealth Advisors, as a Registered Investment Adviser, offers numerous services including:

> **Broad selection of investment solutions tailored to meet the needs of our clients. We are not tied to any particular family of funds or investment products.**
> **Enhanced relationship by allowing us to continue to make independent, transparent, objective decisions based on our client's individual needs and financial goals.**
> **Freedom to develop a business model directly tied to our industry knowledge and passion.**
> **Fee-based structure based on a percentage of assets, an incentive to help grow your assets.**
> **Assets are held at an independent custodian.**
> **Publicly disclosed details about our firm by filing a Form ADV directly with the Securities and Exchange Commission. You are able to review the Form ADVs for RIAs on the SEC website at www.adviserinfo.sec.gov.**