



managing

Monitor your portfolio

It is important to have a professional monitor your portfolio and periodically rebalance it to account for any changes in your personal life as well as in the overall economy.

The following is a visual diagram of the process we will follow while working together.



Your Dedicated Team

Marc Bautis is a Wealth Manager specializing in working with retirees and those nearing retirement who want to protect their principal and ensure their money lasts. He is proud to be able to deliver independent advice, always in his clients best interest.

Marc is a graduate of Seton Hall University and currently lives in Hasbrouck Heights. He is a Bergen County native having attended high school in Lyndhurst.

Contact Marc for a Free, No-Obligation Review of your Portfolio

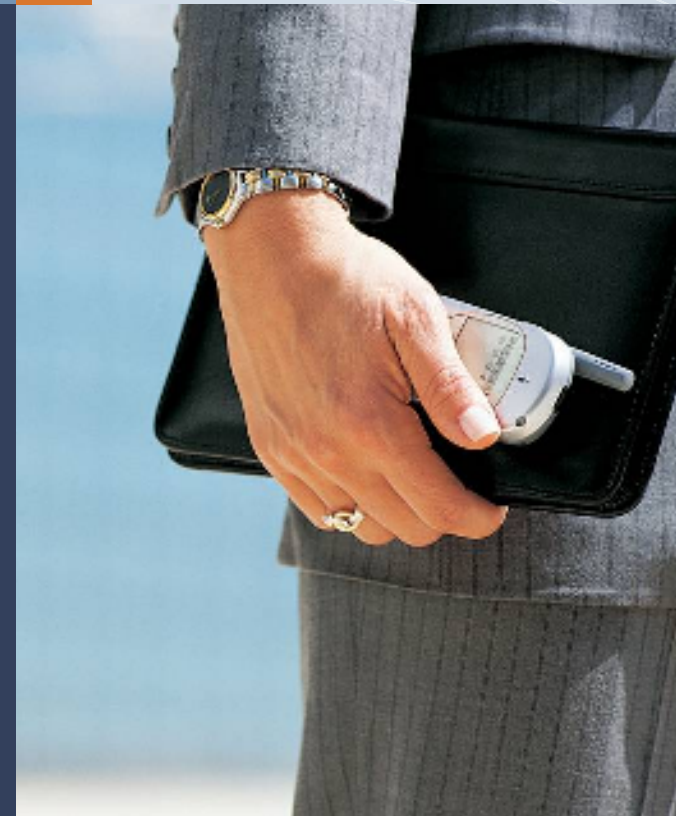
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Bautis Financial

*Secure your castle,
Achieve your dreams*



Secure your castle,
Achieve your dreams

exploring, planning &

achieving



Exploring your short and long-term financial goals

Together we will explore your personal short and long-term goals and dreams to discover what is truly important to you—securing your retirement, buying a new home, sending a child to college or planning your estate.

Planning your financial strategy

After examining your unique situation we develop a financial roadmap. This personalized plan will help guide you to achieve your goals and dreams.

Achieving financial well being

Using our conservative investment philosophy, we implement your plan while minimizing risk. We consistently

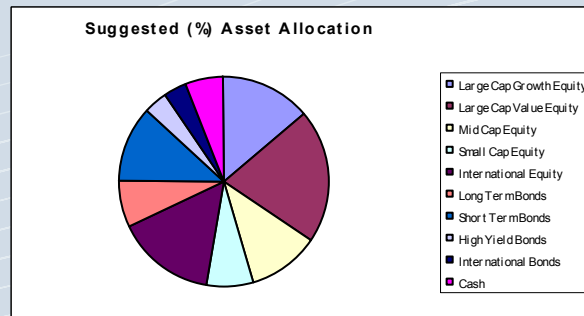
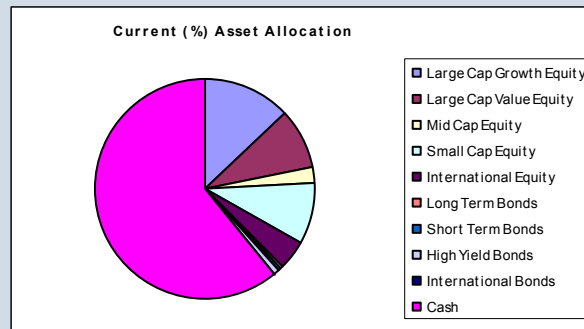
monitor your progress to ensure you stay on the right path to achieving your objectives. Periodically we will meet to determine if there needs to be any adjustment due to changes in your personal situation or the economy.



Asset Allocation

Asset Allocation is the process of aligning your risk tolerances, financial objectives, and investment time horizon to your investment portfolio. The basic premise of asset allocation is that by diversifying your investments over a number of different asset classes, you can help reduce the risk of the entire portfolio while maintaining your desired long-term return rate expectations.

The two graphs below are examples of suggested modifications after an analysis of a clients current allocations.



Commitment to our Clients

Long-Term Relationship

You receive an institutional quality investment plan you can have confidence in. The written plan is your very own financial roadmap customized for your specific situation, based on researching your goals. The relationship does not stop once you receive your plan. We will be there step by step throughout your journey to ensure you stay on the right path towards accomplishing your goals.

Our Client's Best Interest

We function as an Investment Advisor Representative. Our job is to provide you with objective financial and investment advice not tied to selling a specific product.

Our fee is based on Assets Under Management and averages 1% per year. We do not need to sell you anything to get paid. Our income grows only if your account grows.

A Well-Informed Client

Our role as an advisor is to help equip each client to make sound choices. We do this through education, collaboration, and in-depth discussion. By taking this approach we can ensure our clients understand the financial environment and help them make better decisions.

