IMAGINE YOU ARE ON A JOURNEY

But this is no ordinary journey. This is your life's journey. It has peaks, and it has valleys. And, it undoubtedly will have a few obstacles. Regardless of the circumstances, in order to continue on this journey, you need to know where you're headed. And, it helps to reflect back now and then about where you've been.

Welcome to **SummitView**, Touchstone Capital's new, comprehensive, annual view of your entire financial life. It provides the perspective you need to assess where you've been, where you are, and how well you're traveling along your journey.

We call it **SummitView** because not only does it provide a broad view of the lay of the land, like a mountain summit, but also because it is an important meeting of the minds. This comprehensive annual meeting allows you to meet with our entire team and check your progress in all key areas.

AT TOUCHSTONE CAPITAL, WE'RE COMMITTED TO IMPROVING YOUR QUALITY OF LIFE. BE SURE TO TAKE TIME TO ENJOY THE VIEW!

SUMMITVIEW

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TOUCHSTONE CAPITAL

AN AMAZING VIEW AWAITS YOU

SUMMITVIEW

Available exclusively for clients of:

TOUCHSTONE CAPITAL

SummitView is a unique approach to surveying your entire financial picture in one comprehensive meeting.

SummitView is conducted once per year. If you meet with your advisor other times during the year, those meetings will simply be called "Review Meetings."

SummitView covers all of the major aspects of your financial situation. Each of our team members is an expert in different aspects of our business. By taking advantage of their specific knowledge areas, we'll provide you with an even broader perspective and help you stay on top of changes in the financial world as well as in your personal life.

SummitView is detailed. You'll receive an agenda of areas to be covered and checklists to assure nothing has been overlooked, and you'll walk away with a specific action plan of items we both must address.

SummitView is best delivered at our Greater Pittsburgh office so that you can take advantage of direct access to all of our team members. However, if you simply can't come to the office, technology will enable us to offer the same level of service no matter where we meet via videoconferencing.

SummitView won't be any longer than your normal review meeting. In fact, it will be more focused so that we can get the important details taken care of and you can spend the majority of your time with your Lead Advisor discussing your individual financial situation.

SummitView is available for a flat fee, which will be waived for clients with fee-based contracts.

SummitView will help us identify deficiencies such as outdated wills and beneficiary designations, underfunded retirement accounts, missing estate documents, and much more.

When we call you to schedule your next meeting, we'll let you know if it is going to be a SummitView meeting. In the meantime, of course, you can always contact us by phone or email to ask questions or set up a time to talk.

SUMMITVIEW