ENDOWMENT WEALTH MANAGEMENT®
Fee-Only Fiduciary Advisors

EWM Personal Finance
Tips & Solutions

Professional 401(k)/403(b) Account Management

Problem: How to Get Help with my 401(k) or 403(b) Account?

Solution: Let Endowment Wealth Management Monitor your Accounts!

Doesn't your largest retirement account deserve attention and proactive monitoring?

- Morningstar research suggests that professionally managed accounts may improve projected retirement outcomes, including an estimated 11.4% increase in projected retirement wealth for certain investors. These projections are not guaranteed, and actual results will vary.[1]
- Asset allocation and manager selection are not one-time decisions.
- The advice you receive on retirement planning should include ALL of your accounts.

Choose Endowment Wealth Management® as your advisor

- Our firm is an SEC Registered Investment Advisor (RIA) and NAPFA Member.
- Our professional team provides independent, fee-only, fiduciary advice to our clients.
- We utilize our 3-D Endowment Investment Philosophy® to guide our clients' portfolios.
- You receive access to our Personal Online Wealth Portal & Secure Vault Technology to organize your financial life in a single, secure location.
- Our professional team provides you with 150 years of combined experience and includes CPAs, CFP® professionals, CFA® charterholders, MBAs, CAIA®, AWMA®, and CFC®.
- We are the creators of the 3-D Endowment Index® calculated by NASDAQ OMX®.

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We comprehensively analyze our client's entire wealth picture

- Holistic & Personalized Financial Management
- We create holistic wealth plans which encapsulate every detail of our client's finances to provide them with the confidence and financial security to achieve their personal goals.
- We help clients understand how taxes may affect financial and investment decisions and coordinate with their tax professionals regarding tax-related considerations.
- We provide you with a retirement plan to guide your investments and future distribution needs.
- We design a custom portfolio allocation for each client based on their current age, personal goals, and risk tolerance.
- Trading and portfolio rebalancing are coordinated with your advisory team. Depending on the services provided for your account, we work with you to review and implement recommended changes to help keep your portfolio aligned with your objectives.

To learn more about Endowment Wealth Management and our Fee-Only Fiduciary Advice:

Call: (920) 785-6010

Visit: www.EndowmentWM.com

1. Morningstar, *Analyzing the Value of Managed Accounts*, January 13, 2026.