

WHY FACET WEALTH

TEN QUESTIONS

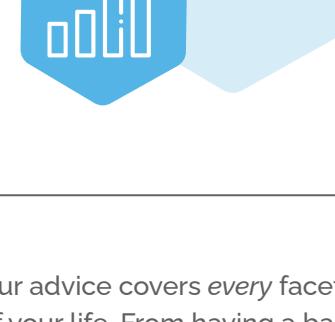
TO ASK BEFORE WORKING
WITH A FINANCIAL PLANNER

We believe it should be easy to understand what a financial planner is offering you, right up front. Here are the 10 questions to ask a potential financial planner (and our answers if you ask Facet).

01

DO YOU REQUIRE A MINIMUM ASSET AMOUNT TO WORK WITH YOU?

There are no asset minimums required to work with us. We're here to help you get ahead regardless of whether you have money to invest.



02

WHAT DOES YOUR ADVICE COVER?

Our advice covers every facet of your life. From having a baby to retirement planning to buying a car, if it affects your life financially, we cover it. Plus, we'll go even further to help you act on that advice.

03

WILL MY PLANNER BE A CERTIFIED FINANCIAL PLANNER™ PROFESSIONAL?

Yes. You'll get a dedicated CFP® professional and fiduciary, which is the highest certification possible, and ours don't sell any products or receive any commissions.



04

WHAT'S YOUR APPROACH TO INVESTING?

We believe that any investment strategy should be developed within the context of a holistic and dynamic financial plan. Our approach to investing is based on Nobel Prize-winning research* and focuses on broad diversification, minimizing cost, and tax efficiency.

05

HOW MANY CFP® PROFESSIONALS WORK FOR YOUR COMPANY?

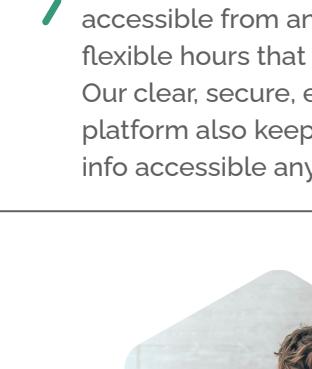
Facet Wealth has 100+ CFP® professionals and they have over 1,000 combined years of experience. Plus, a team of experts in insurance, estate planning, taxes and more!



06

WHAT AM I ACTUALLY GETTING?

You'll get jargon-free advice and easy-to-execute actionable plans to help you achieve your goals. We like to keep things simple.



07

WILL I SPEAK TO THE SAME PERSON EVERY TIME?

Yes. You'll work with your own CFP® professional, every time. You'll have dedicated check-ins with them throughout the year and can plus real time connectivity to your planner in between meetings via our tech platform.



08

CAN I REACH MY PLANNER OUTSIDE BUSINESS HOURS?

Yes. Our virtual service is accessible from anywhere, with flexible hours that work for you. Our clear, secure, easy-to-use platform also keeps your key info accessible anytime.



09

DO YOU MAKE ANY COMMISSIONS OR ARE THERE ANY HIDDEN FEES?

No. You won't find any hidden fees, commissions or surprises with Facet Wealth. Our membership is affordable, transparent, and tied to your needs, not your assets.

Your annual membership fee is fixed, so what you pay doesn't increase as your assets do. That can make a big difference over time.



10

HOW ARE YOUR FEES STRUCTURED?

Get unbiased financial advice for every facet of life from one of the fastest-growing financial services companies. This is financial planning as it should be.

Email or call your dedicated Client Success Manager to continue the conversation.

443-376-6222 | Facetwealth.com
100 International Drive, 23rd Floor, Baltimore, MD 21202