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Attention Expertise Results

Reaching your goals and delivering peace of mind through advanced planning, strategies and management.

WEALTH ENHANCEMENT FROM

PEGASUS ACCOUNTING, LLP
CERTIFIED PUBLIC ACCOUNTANTS

SFA Superior Financial Advisors

A Letter To Our Clients

Dear Client:

With recent events in our country and around the world, many of us find that we are now in a much different place than we expected to be just one year ago. For some of us, our investment portfolios have fallen far out of balance and are no longer consistent with our long-term objectives. For still others, even basic goals have changed.

With tax season upon us, you have an ideal opportunity to take the time to be introspective, to re-evaluate your goals and how they may have changed over the past turbulent months, and to set upon a path that will ensure that your goals are reached.

While we all seek to enhance and preserve our wealth in general, we each have unique circumstances and specific goals that require custom, advanced planning. Working with our investment management partners at Superior Financial Advisors, we are pleased to offer advanced, integrated planning services that incorporate asset protection and tax minimization techniques with wealth enhancement strategies.

By leveraging this proven, methodical process and our expertise in a wide range of investments, we are able to deliver wealth enhancement plans precisely targeted to the sophisticated needs and goals of each of our affluent clients.

We invite you to learn more about our wealth enhancement process and how it can benefit you. We are now scheduling client meetings to begin February 15. To begin, call your client support representative at (800) 555-1000.

As we move ahead into a rather uncertain future, we encourage you to act today to give yourself the peace of mind that comes from knowing that you have structured your investments to produce the best possible performance to achieve your financial and life goals as soon as possible.

Sincerely,

John S. Jones
Senior Partner

Frederick S. Fredericks
Senior Partner

The Process

Pegasus Superior Financial Advisors Investment Evaluation

We employ a proven investment consulting process designed specifically to fully inform us of your financial needs and objectives, derive the best possible recommendations for your portfolio, and keep you apprised of the management of your investments. This balanced, time-tested process ensures that your portfolio is managed in accordance with your financial goals for maximum returns and minimum taxes.

1. **EVALUATION OF CIRCUMSTANCES AND NEEDS**
To craft the best possible recommendations, we focus on fully understanding your particular situation and goals. We ask key questions: What are your personal and professional goals? How do you view your obligations to your family and to the world at large? Who are your other advisors, what role does each play, and how do your prefer to work with them? How are your assets currently structured?

2. **COMPLETE DIAGNOSTIC**
Working from our knowledge of your situation and needs, the *Pegasus-Superior Financial Advisors Strategic Advisory Board* performs a complete diagnostic, evaluating your current position and generating a range of alternatives. From these possible outcomes, the most viable, tax efficient scenarios are selected.

3. **PRESENTATION OF RECOMMENDATIONS**
We next meet with you (and/or your other advisors) to present our recommendations. Realizing that different people work with information in different ways, we take great care to present our recommendations in ways that meet your preferences exactly, so that you receive the type of information you want in ways that are most useful to you. With this information in hand, you (or your advisors) are now ready to make a decision.

4. **DELIVERY OF RESULTS**
With the work of identifying and choosing the best approaches already done, the implementation of your plan is straightforward. The course for your portfolio is now set.

5. **ONGOING MANAGEMENT AND CONTACT**
We continue to manage your portfolio in accordance with your plan with the objective of maximizing the probability of achieving your financial goals. To ensure that all parts of your plan are working in concert and moving towards your best possible outcome, we meet with you on a regular basis to review your portfolio and any changes in your situation or goals.

Let Us Evaluate Your Portfolio

Attention • Expertise • Results

Our Watchwords

FLEXIBILITY. Successful wealth enhancement must be ready to adapt to evolving circumstances, in both your own life and in the financial and legal environments. We anticipate these changing circumstances by preparing a range of planning scenarios.

INTEGRATION. Wealth enhancement rarely stands alone. We maximize advanced planning benefits by identifying and integrating wealth transfer, asset protection and charitable gifting strategies that will support your wealth enhancement goals.

DISCRETION. We regard high degrees of discretion and confidentiality to be absolute prerequisites in working with each client.

SENSITIVITY. We approach each client with sensitivity to their unique levels of risk, need to balance results with costs, and desire for readily understood solutions to their wealth enhancement issues.