Summa Global Advisors

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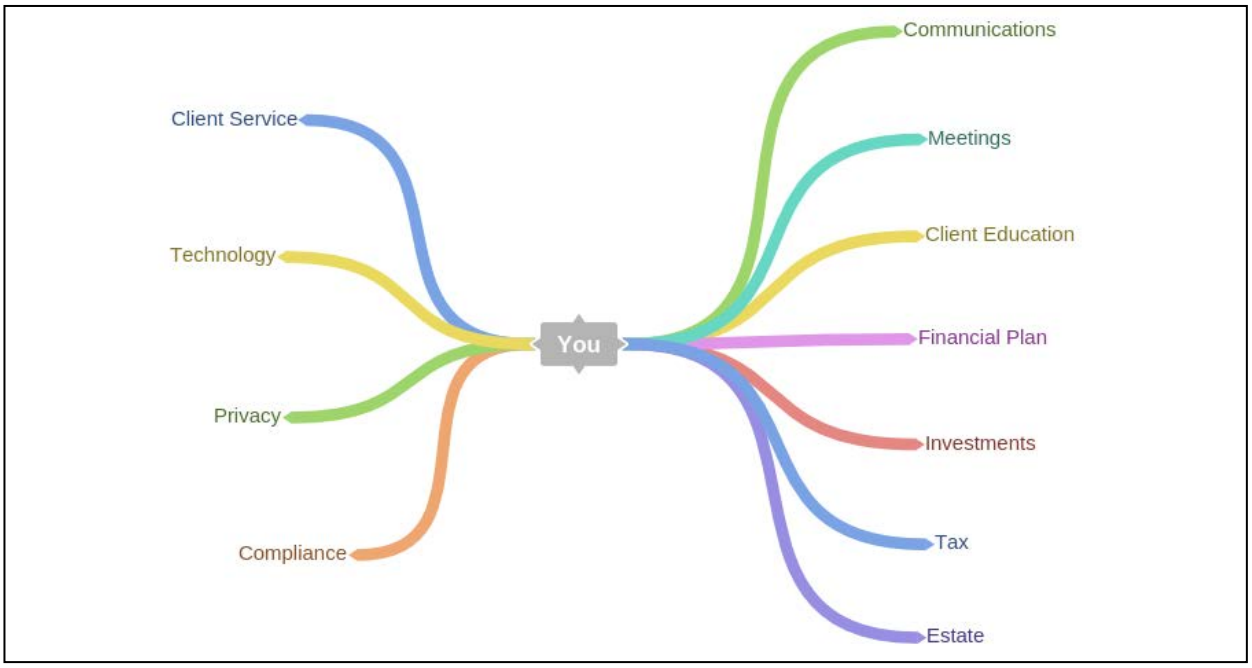
The Summa Global Mind Map

A career in financial services does not come with the glamour or respect that other professions do. There are countless TV dramas and movies praising professionals in the medical industry, law enforcement officers, educators, and even athletes. The most recent movie portraying our industry I have seen is *The Wolf of Wall Street*, a movie that depicts stockbrokers as conniving cutthroats. Thankfully, the new model of financial services includes fiduciary advisors whose job differs greatly from the original broker.

As your advisors, we are people who are passionate about helping you achieve your financial and life goals. At times, however, it is difficult to explain what we do, and more specifically, how we do it. It is only fair for you to understand our work ethic because you trust us with your hard-earned money.

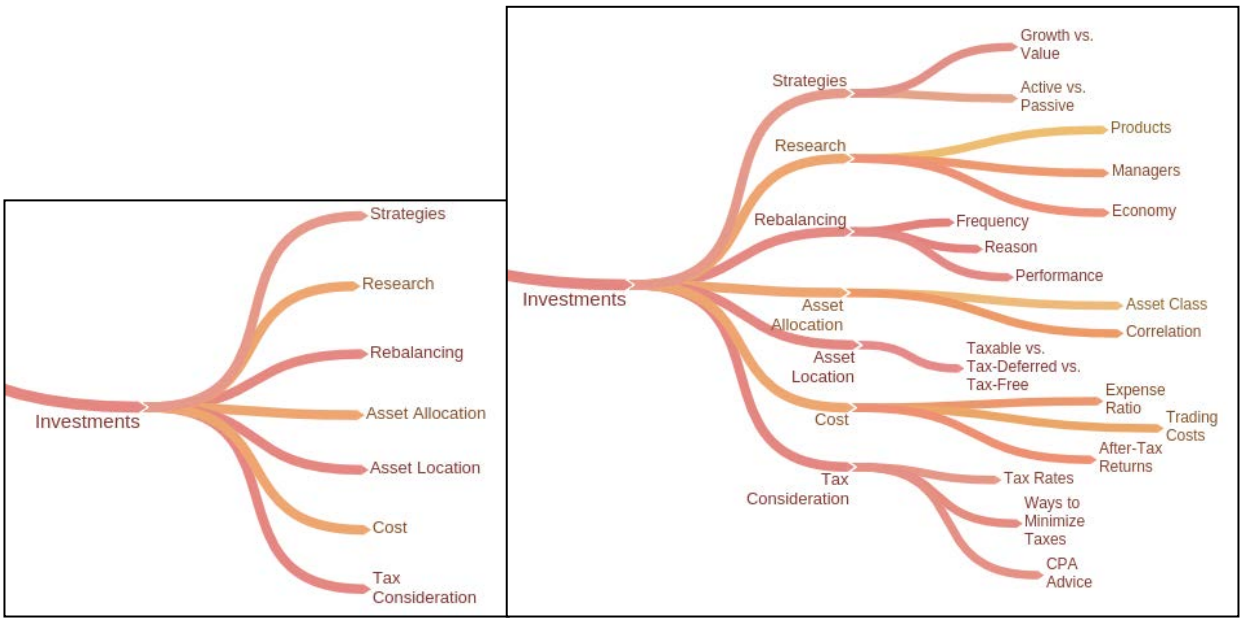
Text only makes concepts more ambiguous and further complicates things. "A picture is worth a thousand words," as the old saying goes. Mind mapping, on a higher level, is arguably one of the best techniques to provide a visual explanation of a financial advisory firm's service model. At the very heart of Summa Global's service model lays just that—our mind map.



On the right side of the mind map are top-level service deliverables: tangible things and outcomes that are a direct result of what we do, of our interaction with you—the client—who sit right in the middle. Each deliverable can also be expressed in another mini-mind map on its own. Since many of you happen to hire us to manage your assets, below is a mini-map about investments.

As you can see, there are seven main items that go into our "Investments" deliverable. Each of these

requires careful consideration, planning and often interactions with other items or even across other service deliverables. For example, how would periodic portfolio rebalancing affect a particular client's tax bills, or investment returns? How does a taxable or tax-deferred account affect our investment decisions? What are the investments strategies that would fit in a client's overall financial plan?



"We pride ourselves in serving you with our heart and soul."

On the left side of the map is operational, or behind-the-scenes, work that completes our service model. The computers we use, the software that makes our job easier, the delivery method of service items, and the policy and procedures that keep us efficient and compliant all play an indispensable role.

The root of it all is having the right people to serve you and cultivating a work culture that embraces integrity, honesty, and a client-first mentality, because, ultimately, you are the reason we exist in the first place, and will persist as our motivation for why we do what we do. We pride ourselves in serving you with our heart and soul.