PFW ADVISORS

Private Family Wealth Advisors

You just took the first step to build your family's financial legacy.

Introducing PFW Advisors

Managing your family's wealth comes with a unique set of challenges. You want to invest your assets properly to grow long-term and provide for your entire family without the stress of constantly overseeing complex financial decisions.

In other words, you need a trusted financial advisor.

But not just any advisor. A group who will protect your assets, keep your best interests in mind and be responsive to your questions and concerns. Not just a massive brand that relegates you to an inexperienced junior advisor, locks you into proprietary software and continuously tries to sell you unnecessary annuities.

Private Family Wealth (PFW) Advisors strives always to be the former and never the latter. We were founded on the idea that the clearer your vision of the future, the easier it is to create a road map to accomplish your goals. That's why we work with you to clarify your goals and tirelessly work towards achieving them together.

We put "family" in our name because our holistic approach looks beyond the immediate family to all those relatives, even friends, who might be impacted by your investment planning. With 40 years of combined experience, we provide academically sound advice tailored to the needs of ultra-high net-worth families like yours.

On behalf of our team, I thank you for your interest in PFW Advisors and look forward to the opportunity to meet with you and learn about how we can serve your family.

Scott MacKenzie, MBA, CFP®, CIMA®, CLU®
Founder and Managing Member

A Different Kind of Wealth Advisor

High-networth families in metro Atlanta have countless options when it comes to financial planners and wealth management firms. The difficult part is deciding which option is best for you.

Choosing one of the big firms or brand names you've heard of is easy. However, there are a few reasons why receiving unbiased advice from a firm like ours is in your best interest.

- We are not owned by a bank, investment firm, or broker dealer
- We are not a broker and don't receive commissions on what we sell
- We are transparent with our fees and never surprise you with hidden fees
- We are a fiduciary and compelled to work in your best interest and according to the highest standards
- We are free to select the best technology and tools for you
- We are a smaller team that can provide you with more care and personalized advice

Helping Unlock Your Wealth's Potential

In addition to avoiding these pitfalls, our team still boasts a high level of experience and credibility.

- Over 40 years of experience with high-net-worth individuals and families
- Holistic services covering all aspects of wealth management
- Coordination of investment, tax, gifting, and estate plans
- Customized investment recommendations based on reaching your goals
- Top education and industry credentials
- Limited number of clients to ensure personalized advice and ongoing service

Holistic Wealth Management Services

The advantage of trusting PFW Advisors is having all financial solutions in one place. Stop worrying about who to ask and come to us with your questions and concerns.

- Investment planning
- Portfolio analysis
- Charitable giving
- Retirement planning
- Estate management
- Alternative investments
- Cash management
- Multi-Generational planning

Combining these services under one roof ensures that each solution aligns with one another and works towards your financial goals.

The Best Times to Seek Our Advice

You're busy and may not have time to research new financial advisors. You're also smart and may seek to do some of this planning yourself. However, we specialize in navigating complex financial situations and take this off your plate so you can enjoy your money rather than stress about it.

Most of our clients are referred by existing clients or one of our professional partners. These are some of the typical situations for why a new client might seek our help.

- Inherited a significant amount of wealth
- Selling or considering selling a business
- Death of a spouse or parent
- Divorce or separation
- Achieved a level of wealth that exceeds your current advisor's expertise
- Nearing retirement age or end of life
- Concern about heirs' ability to manage wealth
- Desire to coordinate all aspects of wealth

Access To The Best Products, Technology And Support

Like everything else, technology has dramatically changed the financial landscape. You're no longer restricted to working with a big firm for access to the best technology and products.

In fact, working with a smaller firm now has its advantages.

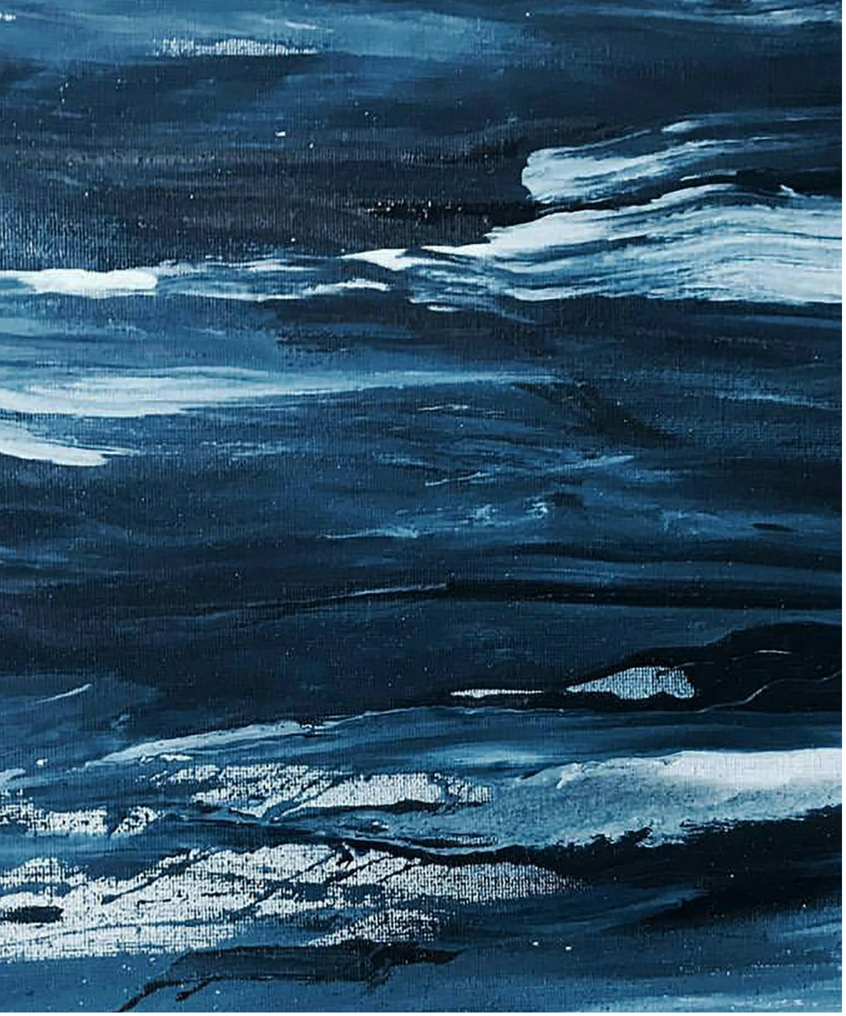
Small wealth advisors still have the same access to the best technology and information as the big firms. However, unlike big firms, we're not locked into a single proprietary technology, stuck with costly overhead, or slowed by layers of middle management.

For PFW Advisors, we have the freedom to choose the tools and products that best fit your unique needs. Thus, we can be more agile and flexible to serve you rather than shareholders.

Some of the examples of technology we use include:

- **Orion** is a leading trading and reporting technology company.
- **Schwab** is one of the largest and most respected custodians in the industry, servicing over $7 trillion in assets and almost 15,000 firms. (Schwab.com)
- **Money Guide Elite** is a Comprehensive Planning Platform that easily engages clients through micro and holistic planning experiences.

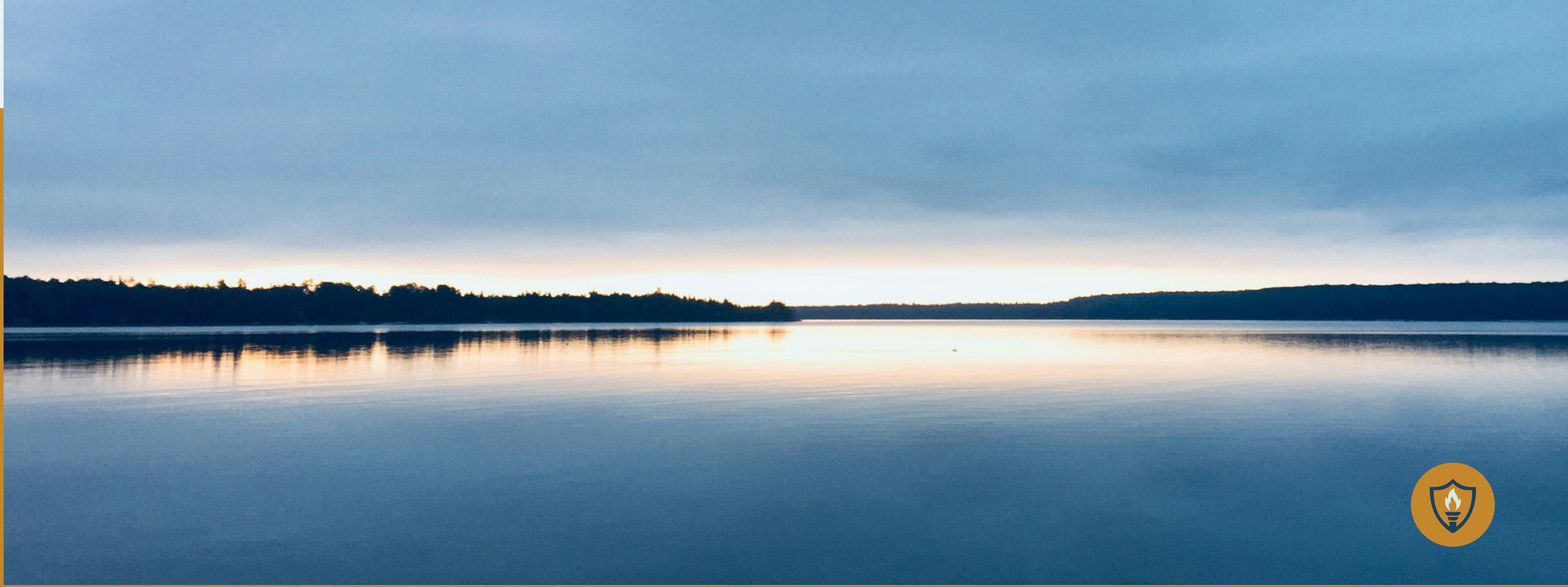
ORION charles SCHWAB ENVESTNET MoneyGuide



Our Network of Professional Resources

Because your financial situation may be complex, our team collaborates with other professionals to coordinate, design, and implement strategies. This means synchronizing communications with your accountants, attorneys, and other specialists.

Your financial plan is impacted by far more than your financial advisor. Therefore, you need these professionals to align with one another. This commitment to making our clients' lives easier underscores the focus on the service on which our company was founded.



EXPERIENCED

PFW Advisors has over 40 years of combined experience serving clients with investment planning, portfolio analysis, and estate matters. Everything we do is centered around acting as financial stewards for high-net-worth families like yours.

Our founder, Scott MacKenzie *(MBA, CFP®, CIMA®, CLU®)*, has spent three decades passionately working on the complex investment and planning needs of the significantly wealthy. We look forward to putting our experience to work for you.

FIDUCIARY

Our role as trusted fiduciaries means we are duty-bound to serve your best interests in every possible way. This is a designation we're proud to hold and take very seriously.

Being a fiduciary means personalized service, no commissions or hidden fees, easy-to-understand wealth management plans, and partnership through your entire financial journey.

REGISTERED INVESTMENT ADVISORY (RIA)

We believe that each of our clients' needs and objectives are unique, and therefore no plan should be cookie-cutter or templated. You deserve a personalized plan that fits your life.

As a Registered Investment Advisory, we can customize your portfolio based on your unique needs and goals. We start by getting to know you and creating a plan that aligns with your values and helps you meet your financial goals.

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Investment advice offered through PFW Advisors, LLC, a Registered Investment Adviser. The information contained herein is for educational purposes only. It is not intended to provide, and should not be relied on for, any tax, legal or investment advice. You are advised to seek the advice of a qualified professional prior to making any decision based on any specific information contained herein. The specific tax consequences of any investment or strategy will depend on your specific tax situation.

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