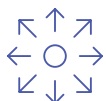


Elizabeth Peterson

CFP[®], CRPS[®]



Primary Services



DISCUSS AND IDENTIFY WHAT YOU WANT TO ACCOMPLISH WITH YOUR MONEY

Create plan to help meet goals.

Analyze current and future cash flow; coordinate all income sources.

Act as personal assistant; maintain financial notes; notify you of action to be taken on time-sensitive matters.

Keep you organized and help simplify your financial life.

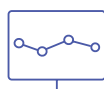


RISK MANAGEMENT

Identify your risk tolerance.

Analyze current and future investment risks; modify as appropriate.

Provide insurance and long-term care insurance; protect against rising health care costs.



INVESTMENT MANAGEMENT

Identify and analyze investment opportunities; monitor daily.

Track your progress with you in regular performance reviews.

Keep you updated on market perspectives.

Spend time helping you understand the "hows" and "whys" of recommendations.



Elizabeth Peterson

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The Extra Mile

- Facilitate intergenerational communications; mediate family planning meetings.
- Help instill your vision and philosophy in your children.
- Offer financial guidance to your children, parents and others close to you.
- Provide guidance on external financial assets, e.g., 401(k)s, deferred compensation and employee stock ownership plans, assets and liabilities, etc.
- Evaluate financial aspects of job offers.
- Act as sounding board for any issue or concern.



Deeper Dive

- Deliver one-stop shopping; coordinate and collaborate with other professionals, e.g., your attorney or accountant.
- Provide general guidance on tax, charitable and legacy planning; discuss estate-planning strategies.
- Offer invitations to special educational seminars and events to deepen knowledge on topics such as Medicare, Social Security and taxation, among others.

Life insurance, disability income insurance and long-term care insurance are offered through Morgan Stanley Smith Barney LLC's licensed insurance agency affiliates.

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