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LONGVIEW
FINANCIAL ADVISORS, INC.

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FINANCIAL PLANNING ♦ WEALTH MANAGEMENT

Longview At A Glance

Background

- Established in 1994
- Fee-Only
- Fiduciaries
- Registered Investment Advisors with Securities and Exchange Commission (SEC)
- Offices in Huntsville and Gadsden AL, but clients are located throughout the nation

National Association of Personal Financial Advisors (NAPFA)

- All Longview Professionals are members of NAPFA
- Core Values
  - Competency
  - Compensation – Fee-Only
  - Comprehensive
  - Fiduciary Responsibility
  - Full Disclosure of Conflicts of Interest
- Double the Certified Financial Planner Board's Continuing Education Requirement
- Community-like association of advisors that acts like a back office research staff of 2,200+

Custodian

- Fidelity Investments - Institutional
- Longview also manages assets in employer retirement plans such as 401ks, 403bs and TSPs

Full Service Wealth Management

- Ongoing Financial Planning
  - Goal Determination
  - Data Gathering & Organization
  - Cash Flow Planning
  - Retirement Planning
  - Risk Assessment & Mitigation
  - Tax Planning
  - Estate Planning
  - Education Planning
  - Charitable Giving and Philanthropic Plans
- Plan Implementation
- Ongoing Investment Management

Investment Philosophy Highlights

- Well-researched, disciplined
- Global Portfolio Framework
- Actively seek opportunities to both protect and grow portfolios according to the economic outlook and market factors

Coordination With Your Other Professionals, as appropriate

- Attorneys
- Accountants/Tax Preparers
- Insurance Agents
- Banker/Lender
- Longview can assist with referrals, as needed