Wescott FINANCIAL ADVISORY

Certified B Corporation

WORKING WITH WESCOTT

Your Partner in Life-Minded Wealth®

At Wescott Financial Advisory, we take you beyond wealth management to achieve **Life-Minded Wealth**®. This personalized approach aligns your financial decisions with your life objectives, aspirations, and values...bringing more meaning to your assets than a narrow set of financial metrics.

When you partner with Wescott, you get more than a financial advisor. You get a complete team, including estate, tax, investment, and insurance experts at your table. You'll even have access to resources to support healthy family dynamics around money. This holistic, team-based approach ensures that every area of life that your finances touch is aligned with your personal vision of success. And along the way, we track your progress with our proprietary PerfectScore® tool so you always know you're right on target.

Our approach brings together the best of financial planning and investment management — and has worked for HNW/UHNW families, trusts, foundations and other institutions. For nearly four decades, Wescott has proudly served, and continues to serve, as its clients' fiduciary.

Est. 1987

With nearly 40 years of history serving forward-thinking families like yours, Wescott is deeply committed to providing you boutique service with proactive communication and planning.

OUR SERVICES

Experience the Wescott Difference

Investment Management

Tax-Smart Asset Migration

Implementation Planning

Ongoing Due Diligence & Monitoring

Portfolio Reporting

Tax Loss Harvesting

Dedicated Investment Research Group

Retirement Planning

Savings Optimizations

Income Replacement Strategies

Tax-Smart Methodologies

RMD Management

Estate Planning

Review/Update Critical Documents

Asset Protection

Lifetime Gifting

Trust Planning

Philanthropic Goals

Education Planning

Estate Attorney Coordination

Tax Planning

Tax Minimization Strategies

Income Optimization

Tax Professional Coordination

Financial Analysis

Net Worth Statement Development

Cash Flow Analysis

Expenses, Credit & Liquidity

Risk Management

Insurance Policy Analysis: Property & Casualty, Life & Disability, Long-Term Care, Umbrella, Health

Capital Needs Analysis

Family Office

Business Lifecycle Planning

Family Meetings & Governance

Trust & Lifetime Gift Planning

Philanthropic Advisory, Implementation & Management

UHNW Investment Solutions

Tax Loss Harvesting

Dedicated Investment Research Group

The Wescott Difference

PerfectScore®

Life-Minded Wealth®

myWescottVault®

STRATEGIC EDGE

Certified B-Corporation®

Gender-balanced leadership & staff

Ready to plan your next chapter?

Connect with our expert advisors or visit wescott.com

Certification received May 2020. B-Corp Certification is a designation that a business is meeting high standards of verified performance, accountability, and transparency on factors from employee benefits, charitable giving and community inclusion to supply chain practices and input materials. Wescott pays a fee and submits an Impact Assessment to qualify for and maintain this certification.

Information Wescott Financial Advisory Group, LLC ("Wescott or the "Firm") is an SEC registered investment adviser with its principal place of business in the Commonwealth of Pennsylvania. Registration does not imply a certain level of skill or training. Wescott may only transact business in those states in which it is notice filed, or qualifies for an exemption or exclusion from notice filing requirements.

Views are subject to change at any time based on market and other conditions. Wescott has prepared this material for the purpose of providing general information regarding its investment advisory services where providing such information is not prohibited by applicable law. The information contained herein should not be construed as personalized investment advice, and should not be considered as a solicitation to buy or sell any security or engage in a particular investment strategy.

For information pertaining to the registration status of Wescott, please contact Wescott or refer to the Investment Adviser Public Disclosure web site (www.adviserinfo.sec.gov). For additional information about Wescott, including fees and services, send for our disclosure statement as set forth on Form ADV from Wescott using the contact information herein.

Past performance is no guarantee of future results. Investing involves risk, including the possibility of loss.