

On Target Wealth Partners believes a collaborative relationship between the advisory firm and clients built on a clear understanding of roles, services, philosophy and objectives will yield a successful, long-term partnership.

High net worth individuals and families that embody the following characteristics are prime candidates to become life-long OTWP clients.

- Recognize their busy lives necessitate assistance in formulating and executing an investment and financial plan to meet life goals
  - Are ready for straight forward, honest, factual, and thorough discussions of current investment status and life goals
  - Seek to maximize returns at an appropriate and selected risk level
  - Believe wholeheartedly in the overwhelming evidence in support of implementing an On Target Wealth Partners' passive investment strategy
  - Have the courage and discipline to tune out short term noise in the financial markets and remain committed to a long term plan
  - Want a fee-only independent advisor with fiduciary responsibility that is free from conflicted interests and committed to professional customer service
  - Desires to have an investment and financial plan that works for them and permits one to enjoy life incrementally
  - Maintain or are currently on a glide path to an investable asset base of at least \$100,000