

You work hard and  
want your wealth to  
be cared for.

**You need stewards for your  
financial legacy.**

Unmatched expert advice is here.  
Point us in the direction of your dreams.

**WH Cornerstone**  
Investments



[WWW.WHCORNERSTONE.COM](http://WWW.WHCORNERSTONE.COM)



**Money**  
**Management**



## ***Sound, visionary stewardship starts with putting you first.***

### **We believe...**

Money matters. As a Registered Investment Advisory firm (RIA), we're beholden to no one but you. Our fees are transparent and there are no hidden costs or expenses. That's part of our Fiduciary obligation to you.

### **Our approach**

We believe in best of breed money management and buying good companies to hold them.

We build performance models based on your comfort with risk and your unique life circumstances. And we always build our portfolio with:

- ☐ Diversification
- ☐ Liquidity
- ☐ Cost Efficiency
- ☐ Tax Efficiency

### **What's included?**

We'll have an initial discovery meeting where we help you answer these questions:

- ☐ Where are you now?
- ☐ What does your future look like?
- ☐ What is your tolerance to risk?

Then, we'll work with you to build a short-term, actionable plan.

### **Included in every money management relationship is:**

- ☐ Online account access to our portal
- ☐ Monthly statements provided by custodian
- ☐ Ad-Hoc performance reporting
- ☐ Pertinent economic and financial alerts
- ☐ Monthly e-newsletter with timely advice
- ☐ Unlimited access to Principals

