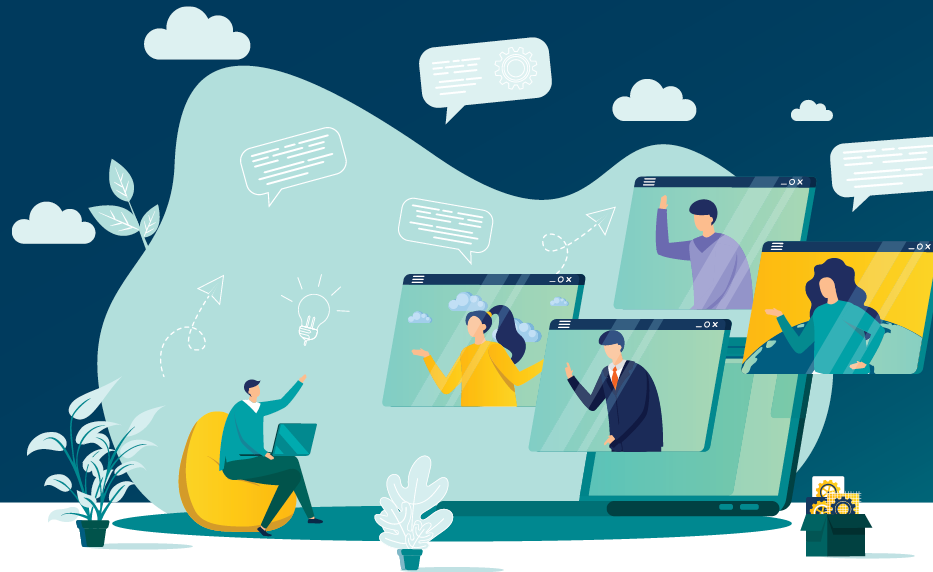


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ADVISORFEST

EXPERIENCE • GROWTH • TRANSFORMATION

Delivering a Better Client Experience



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Presented by:

Andrea Loin Digital Marketing Specialist

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Our Why

SYMMETRY®



WHAT

Advice for life

HOW

Evidence-based investing

WHY

Expertise with integrity

How We Help Advisors

SYMMETRY®

What We Do

Comprehensive Business Partner

Experience
Help Your Clients



Growth
Help More Clients



Transformation
Help Yourself
& Your Team

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What We Do

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Experience

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Clients



Growth

Help More
Clients



Transformation

Help Yourself
& Your Team

Experience Resources

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Invested in Your Goals

Help Clients

- 1-on-1 Business Consultations & Strategy
- White Labeled Materials
- Video Capabilities
- Client Communications
 - *OnBalance* Monthly Newsletter
 - Quarter-in-Perspective Presentation & Quarterly Commentary
 - Client Calls & Webinars
- Special Resources
 - Volatility Center & Checklist
 - Year-End Center & Checklist
 - Tax Center
- My Symmetry



Volatility Resource Center

At times of heightened anxiety and volatility, gathering relevant information is important, as knowledge replaces fear, and promotes clear thinking. To help you provide your clients with information and perspective, we've put together the Volatility Website with a variety of resources—from talking points to presentations—you can share.

Check the site often as we will continue to update regularly.

Unfiltered Finance Podcast & Blog: Market Corrections & Crashes

Equities markets have gotten off to a decidedly ugly start to the year, as various indices flirt with correction, if not bear market, territory. On the most recent episode of our Unfiltered Finance podcast, host Casey Dylan explores causal factors for market corrections and crashes from both an academic and practical standpoint with Dr. John McDermott, Symmetry's Chief Investment Strategist, Portfolio Manager, Panoramic Mutual Funds.

You can also read more about market correction in and share with your clients our latest blog post, *Market Correction...or "2022 Tech Wreck"?*.

Resources for Use with Clients

Videos

- Bear Market Planning
- The Power of Time

ADVISOR INSIGHTS
Monthly Ideas, News & Information

Click here to subscribe to this monthly newsletter

Client Resources

Russia's War with Ukraine

We've put together a number of resources you can use with clients concerned about Russia's war with Ukraine and the market volatility and potential economic impact.

- **Client Letter** you can brand with your own logo and information
- **Blog** explaining the negligible direct impact of Russia on Symmetry's investment models

How We Help Advisors

SYMMETRY®

Comprehensive Business Partner

Experience

Help Your
Clients



Growth

Help More
Clients



Transformation

Help Yourself
& Your Team

Full Suite of Marketing Materials

Inflation Concernation: Should Investors be Worried?

When: Wednesday September 22, 2021 4pm ET/2pm PT
Register Today!

Investors face ongoing uncertainty around an evolving monetary and fiscal environment, heightening concerns about the possible transitory nature of recently elevated inflation.

This webinar, for advisors and clients, offers an update on the Fed, bond tapering, inflation, and the potential impact on markets.

Register

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Symmetry Tax Resources

Distributions, Deadlines, Forms & More

FACTORS ARE THE FUTURE OF INVESTING

3:31

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Minimizing the Impact of Taxes in Your Portfolio

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THE SYMMETRY GUIDE TO SOCIAL MEDIA

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ADVISORFEST

EXPERIENCE GROWTH. TRANSFORMATION.

June 22 - June 24
Houston at 10am PT and 11am ET/2pm PT

Join Symmetry for AdvisorFest, a 3-day virtual event for independent Advisors focused on successful strategies and solutions for helping to deliver a better client experience and growing your practice.

When: June 22 - June 24
Sessions will be held each day at 11 AM ET/8 AM PT and 2 PM ET/2 PM PT

Register

SYMMETRY PANORAMIC

MUTUAL FUNDS & MODELS

Minimizing the Impact of Taxes in Your Portfolio

THE FUTURE OF ADVICE

www.panoramicfunds.com

SOCIAL MEDIA FOCUS WEEK

August 22 - 27

According to a recent survey, almost 50% of investors say social media impacts whom they hire as a financial professional and 33% report they seek financial advice online. In fact, 20% of investors across age, income and assets said that an advisor's social media was their sole deciding factor in the decision-making process when evaluating a financial professional.

Symmetry's Social Media Focus Week features 4 quick webinars to get you up to speed with best practices and Advisor Case Studies on each of the main social media channels.

You can register for one webinar or register to attend all!

www.symmetry.com

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4 Digital Marketing Essentials

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PrecisionCore

An award-winning ETF portfolio solution.

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Symmetry Partners brings decades of experience and commitment to helping advisors and their clients achieve their most important goals with confidence.

You do this by drawing on extensive academic research... and Symmetry's focus on the long-term value of our clients' investments.

Our Evidence-Based Investment Models and ETF portfolios combine the best of both worlds.

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BE PREPARED FOR MARKET DOWNTURNS

2:12

Planning Center

Advisors plan a successful 2022

SYMMETRY PANORAMIC

MUTUAL FUNDS

HOME MODELS FUNDS STRATEGY ABOUT RESOURCES CONTACT

INVESTING SHOULD BE OBJECTIVE

Learn More

3 YEAR ANNIVERSARY

PANORAMIC STANDS APART

In a world where investments too often rely on guesswork, gut instincts, emotion or unnecessary risk...Panoramic stands apart. Symmetry Panoramic Funds and Portfolio Models are built and managed with a disciplined, best-of-breed approach...

HubSpot

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Growth Plan

Practice: _____
Name: _____
Date: _____

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WOULD YOU HAVE

Creating Plan Pro

Created

Growth Resources



Help More People

- 1-on-1 Business Consultations & Strategy
- White-Labeled Materials
 - Presentations
 - Brochures & Fact Sheets
 - Videos
- Educational Whitepapers
- Prospecting, Referral, and Retention Support
- Portfolio Analysis and Reviews
- Hypothetical Illustrations
- Event Support

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THE CRITICAL ROLE OF A FINANCIAL ADVISOR

Navigating the World of Investing

Why do some investors choose to "go it alone" to navigate the world of investing based on their own observations, information, or feelings? Maybe they believe that investing is easy or that making their own investment decisions is more cost efficient?

According to a study by DALBAR Inc., over the period 2001 – 2021, the average equity fund investor received an annualized return that substantially lagged the return of the S&P 500. Fixed income fund investors did even worse—in an asset class that is supposed to be generally less risky than stocks.

The Value of a Financial Advisor: The Opportunity for Greater Return

Asset Class	Annualized Return %
S&P 500	9.52%
Average Equity Fund Investor	8.13%
Hypothetical Illustration	0.44%

Why?

- Many investors sell underperforming investments and replace them with others that are performing well, aka "buying high" and "selling low".
- Emotionally-driven decisions can cause trading at inopportune times
- Investment activity motivated by media hype or so-called "experts"
- Poor market timing decisions resulting in missed opportunities.

A Financial Advisor Can Help

While investment returns are unpredictable, a financial advisor can help you stay focused on your investment objectives and committed to your long-term plan. An experienced advisor will help you to define your goals and implement a strategy designed to potentially increase your returns over time.

Your financial advisor can assist you in:

- Creating a long-term financial plan to achieve what is important to you personally and financially
- Constructing a suitable portfolio to help get you there
- Monitoring your progress toward achieving your goals
- Making sure your plan and portfolio keep pace with changes in your life or circumstances

An Independent, experienced financial advisor can make a real difference in helping you achieve your most important long-term goals.

Performance does not guarantee future results. All data is from sources believed to be reliable but cannot be guaranteed or warranted. Please see important disclosures on the next page for limitations to the performance information.

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TAX PLANNING CALENDAR

This calendar provides an example on key tax deadlines and tax planning activities throughout the year.

Month	Action Items	Review Items
January	• Begin to compile information for tax reports • Confirm estimated tax payments	• Preliminary current year tax plan review • RMD review • Estimate tax upcoming cash flow needs • Determine tax withholding review • Distributability of tax review
February	• Prepare tax reports • Begin collecting tax returns	• Preliminary current year tax plan review continued
March	• Prepare tax reports continued	• Tax return review • Contributions to qualified plans
April	• Confirm estimated tax payments	• Tax return review continued • Tax extension review • Contributions to qualified plans continued
May	• Collect remaining tax returns • Prepare tax notes	• Current year tax plan review • Tax projections
June	• Confirm estimated tax payments	• Current year tax plan review continued
July		• Review YTD contributions to contributory plans
August		• Mid-Year Review (including distributions, contributions and medical payments)
September	• Confirm estimated tax payments	
October	• Final collection of tax returns	• Tax return review continued • Final contribution planning • business retirement plans
November		• Final current year tax plan review • Distribution planning • Contributions to qualified plans
December	• Confirm State estimated tax payments	• Final current year tax plan review continued • Estimated 2024 Goals review • ROTH conversions

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Invested in Your Goals

Presented by:

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Help Your
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Transformation

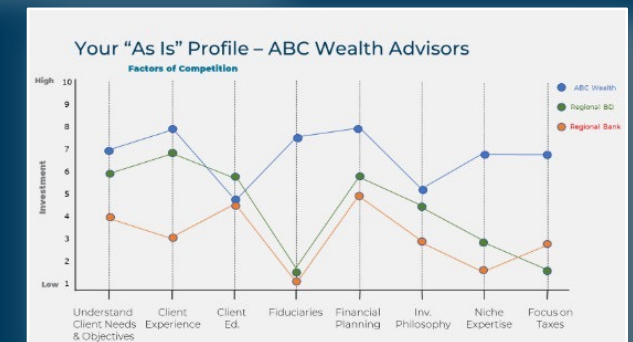
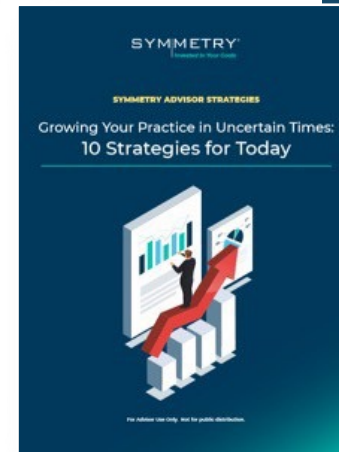
Help Yourself
& Your Team

Transformation Resources



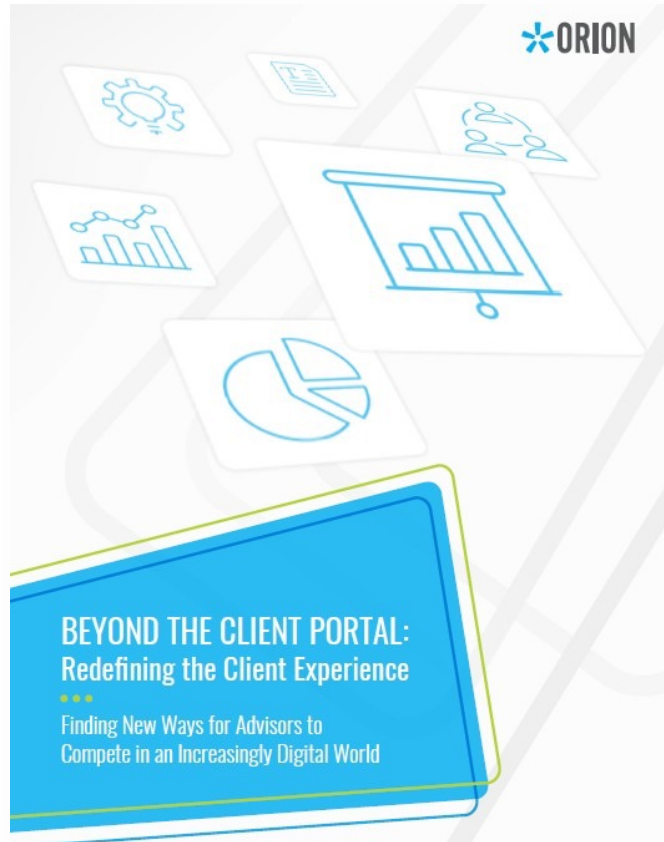
Help Yourself & Your Team

- Dedicated Regional Teams
- Customized Onboarding
- Practice Management Resources
 - Marketing Diagnostic
 - Referrals Guide
 - Presentation Library
 - Growth Plan
 - Strategy Canvas
- Advisor Insights (Monthly e-Newsletter)
- Monthly Podcasts
- Educational Events & Monthly Webinars (many with CE)
- Advisor Community



Firms Focusing on Client Experience...

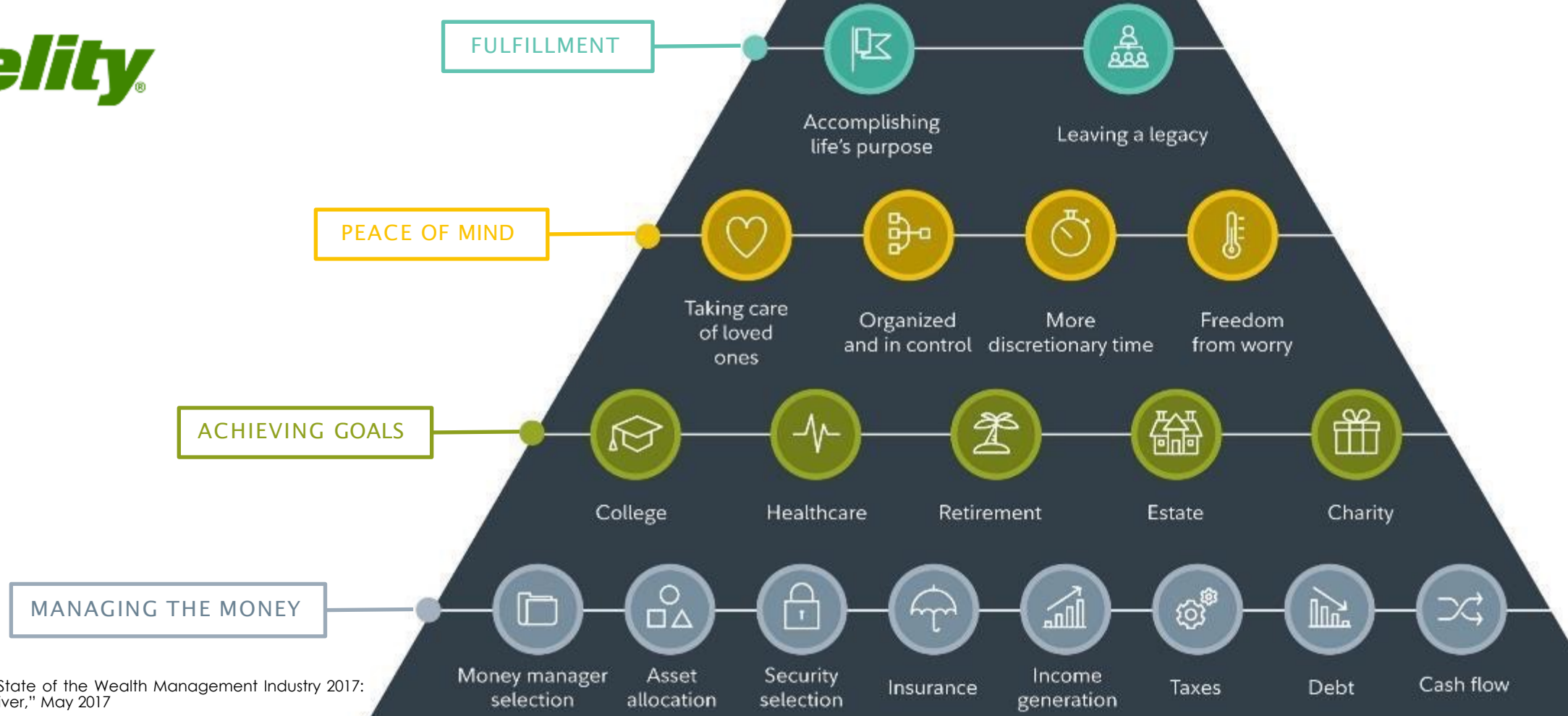
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- Grow **5x** faster than those that don't
- Command **16%** price premium on products & services

Source: *BEYOND THE CLIENT PORTAL: Redefining the Client Experience*. Orion, 2019

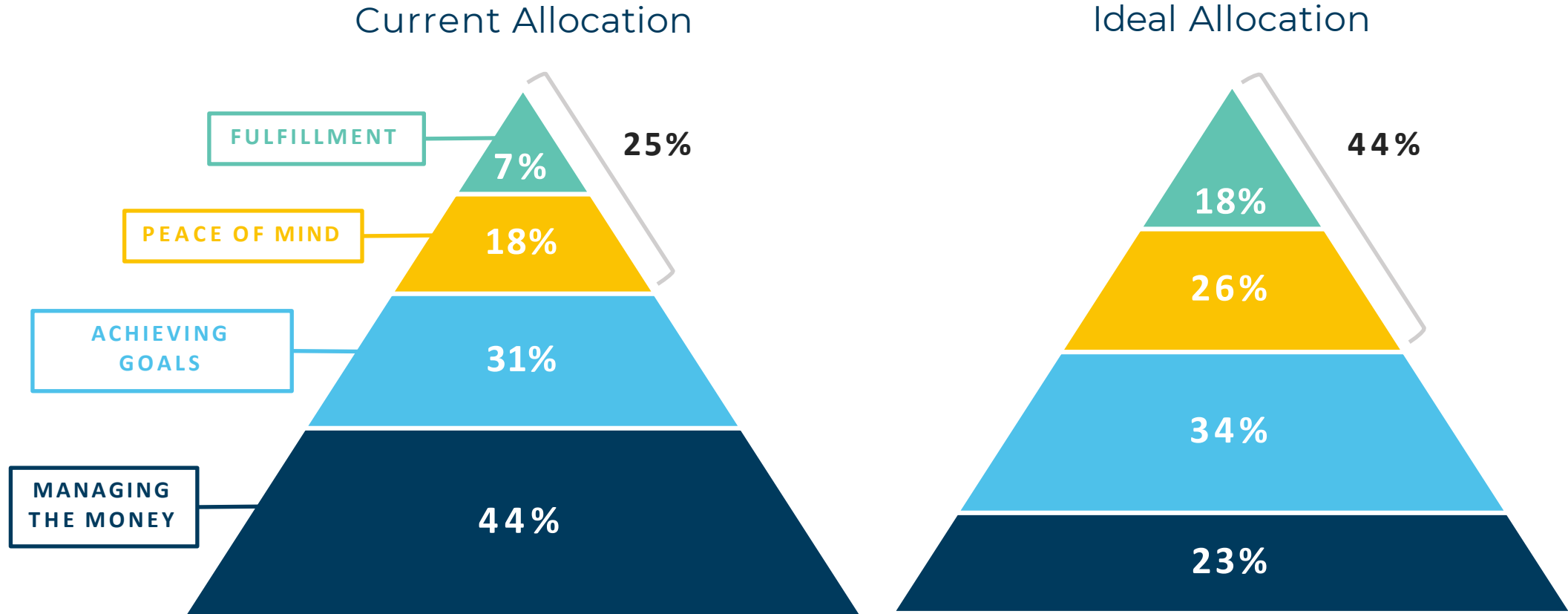
The Value Pyramid



Source: Fidelity, "State of the Wealth Management Industry 2017: The New Value Driver," May 2017

Time & Value

“How would you ideally like to allocate your time with a typical client?”



Source: 2017 Fidelity Value of Advice Day Pre-Work Survey completed online by attendees in advance

**People will forget what you said,
people will forget what you did,
but people will never forget
how you made them feel.**

— MAYA ANGELOU



Questions?



Thank You



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