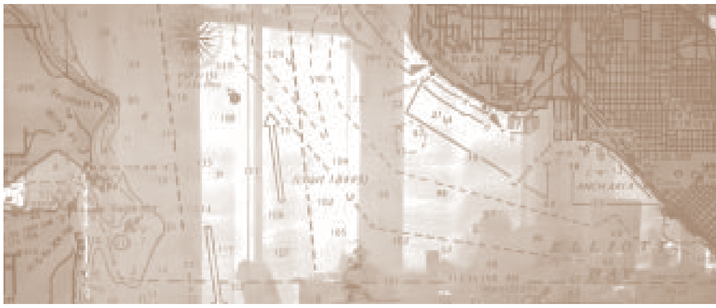
RA Bench

*Creativity, competence, thoughtful analysis and superb service are the reasons clients come to us and stay with us. Since 1995, RA Bench has provided a tailored and comprehensive approach to designing, planning, and coordinating employee benefit plans, fringe benefit programs for senior executives, and wealth management strategies.*



# WEALTH MANAGEMENT SERVICES AND ADVANTAGES

## EXTRAORDINARY SERVICE STANDARDS | UNBIASED ADVOCATE | CONFIDENTIAL SETTING

The RA Bench team consists of dedicated, highly competent professionals and staff assigned to each of our clients. Accountability and a commitment to personal service distinguish our firm. We are an independent wealth management firm, paid an annual retainer by our clients based on assets under management and not through commissions on trades or fees for proprietary products. All relationships are conducted in a private setting with full client confidentiality. Blind accounts are available if desired.

## INVESTMENT POLICY STATEMENT | SOPHISTICATED REPORTING AND RECORDKEEPING

A written "business plan" is developed for every client portfolio, including a detailed fiduciary document outlining the scope of the relationship. Progress toward objectives is validated and documented. Tailored, comprehensive reports may include all liquid and illiquid financial assets, relevant transaction summaries for tax compliance, and detailed performance analysis and commentary.

## COMPREHENSIVE WEALTH MANAGEMENT | CUSTOMIZED MANAGEMENT STRATEGY

We offer integrated investment strategies—encompassing estate, philanthropic, and asset managment concerns—developed in concert with other advisors our clients may have. Investment management and insurance contract review and assessment are standard, as well as transaction cost review and debt management oversight. We offer access to a broad array of money management styles and strategies. Alternative investments include hedge funds, private equity, and real estate. Our portfolio development is creative and unique.

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