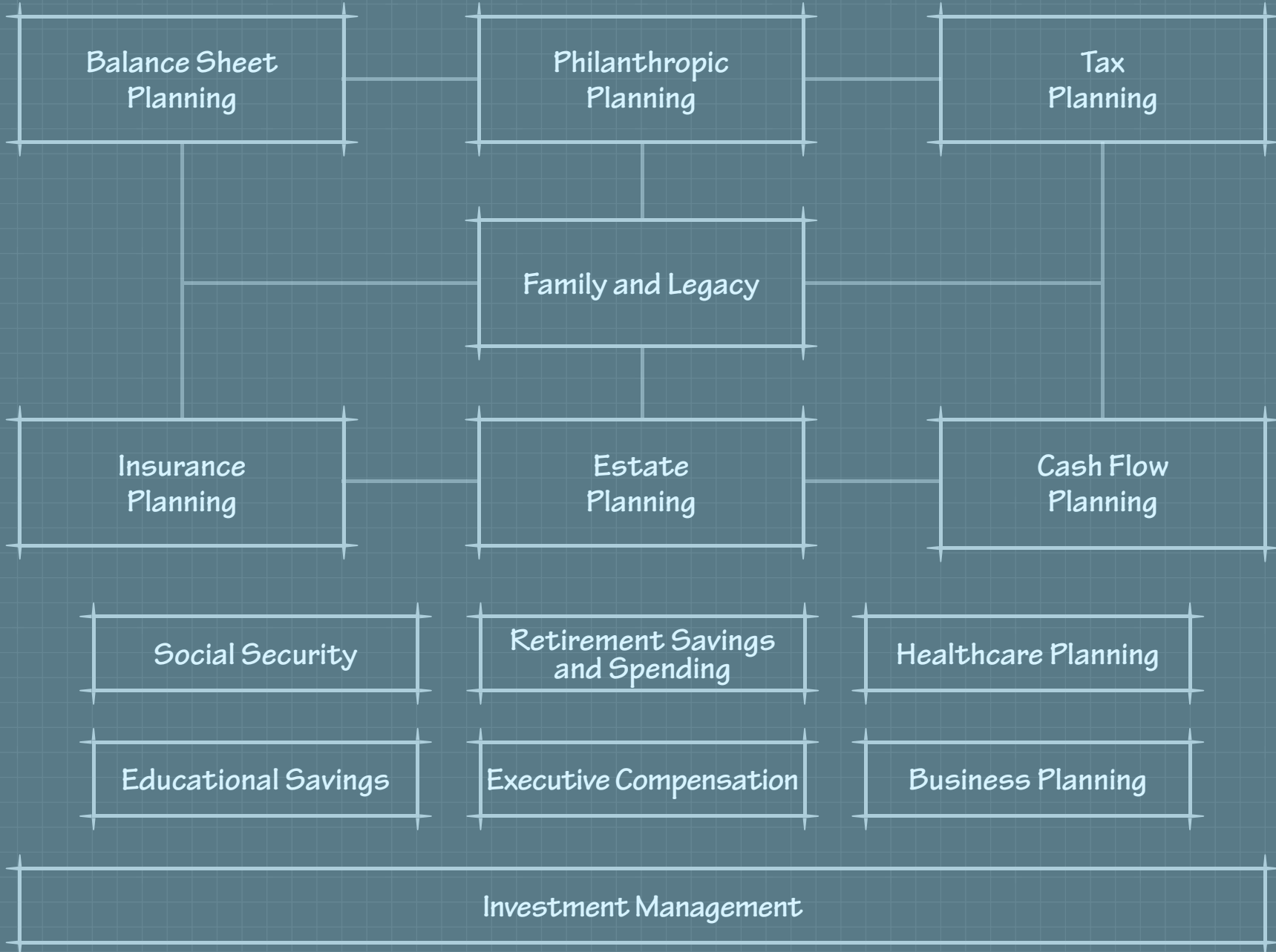




BALENTINE

BLUE PRINT



Our Approach to Planning

Our financial planning process is customized to meet your needs. We tailor our relationship to dynamically prioritize your relevant planning areas. This approach allows us to help you quantify your aspirations, evaluate various paths for achieving these goals, and develop a blueprint of financial decisions to maximize the likelihood of success, however you define it.

Prioritize what's important

Planning encompasses a plethora of areas, with varying degrees of importance, urgency, and complexity based on your age, stage, career, or situation. We will help address your most pressing needs first, keeping other areas in our peripheral to undertake when the time is right.

Access expert advice

We engage with your current advisory team and introduce experts when necessary, to bring you information and recommendations truly tailored to you and in your best interest. Together with your tax, legal and other advisors, we make informed recommendations amid your varying circumstances, communicating across your advisors to ensure each party knows pertinent information needed to do their job for you.

Find clarity & simplicity

Your financial world is complex, but understanding it doesn't have to be. We aim for you to keep a pulse of your full financial picture in one place with timely data. That's why we address each area at a time, when it's relevant, to help you understand where you are today without it being overwhelming, so that you can take the next best step.

Plan continuously

Life isn't static, and your financial plan shouldn't be either. Our plans aren't shelved documents referenced annually, but rather dynamic scenario planning to help you visualize the what-ifs. Myriad scenarios can alter your economic future, and it is our job to guide you amid varying circumstances and decisions. It's continuous planning, rather than a plan that leads to selling a product.

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Balentine is an investment adviser registered with the U.S. Securities and Exchange Commission (SEC). Registration does not imply a certain level of skill or training. More information about Balentine's investment advisory services can be found in its Form ADV Part 2, which is available upon request. For more important disclosures visit www.balentine.com/disclosures



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