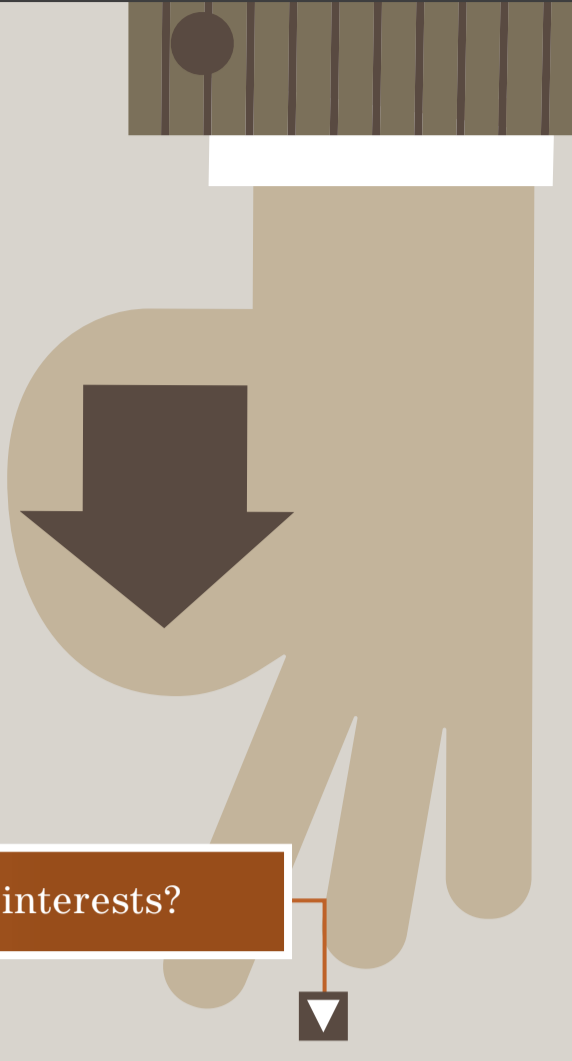
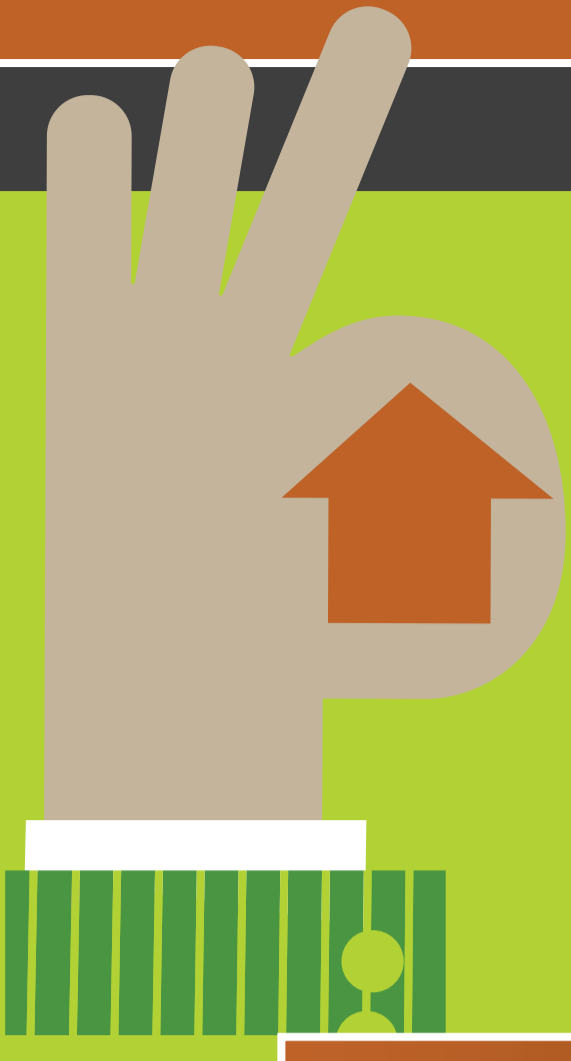


FINANCIAL ED 101 : WHY US?

REGISTERED INVESTMENT ADVISOR

versus

A STANDARD STOCKBROKER



Who looks after your interests?

RIAs have a legal fiduciary obligation, meaning that they have to put their clients interest before their and the firms interest and they have to disclose any potential conflict of interest.

Brokers don't typically have a fiduciary duty with their client, they do have a suitability duty. Meaning that they might put their personal or company's interest before the client's interest.

How are you being charged?

RIAs typically charge a fix annual fee as a percentage of assets under management. Fees don't go up depending on the amount of trade they do. Being unbiased with the types of assets/managers selected for your portfolio.

Brokers charge a commission which is subject to the amounts of trades they do and the type of products they buy, causing them to have a direct conflict of interest with the products they offer.

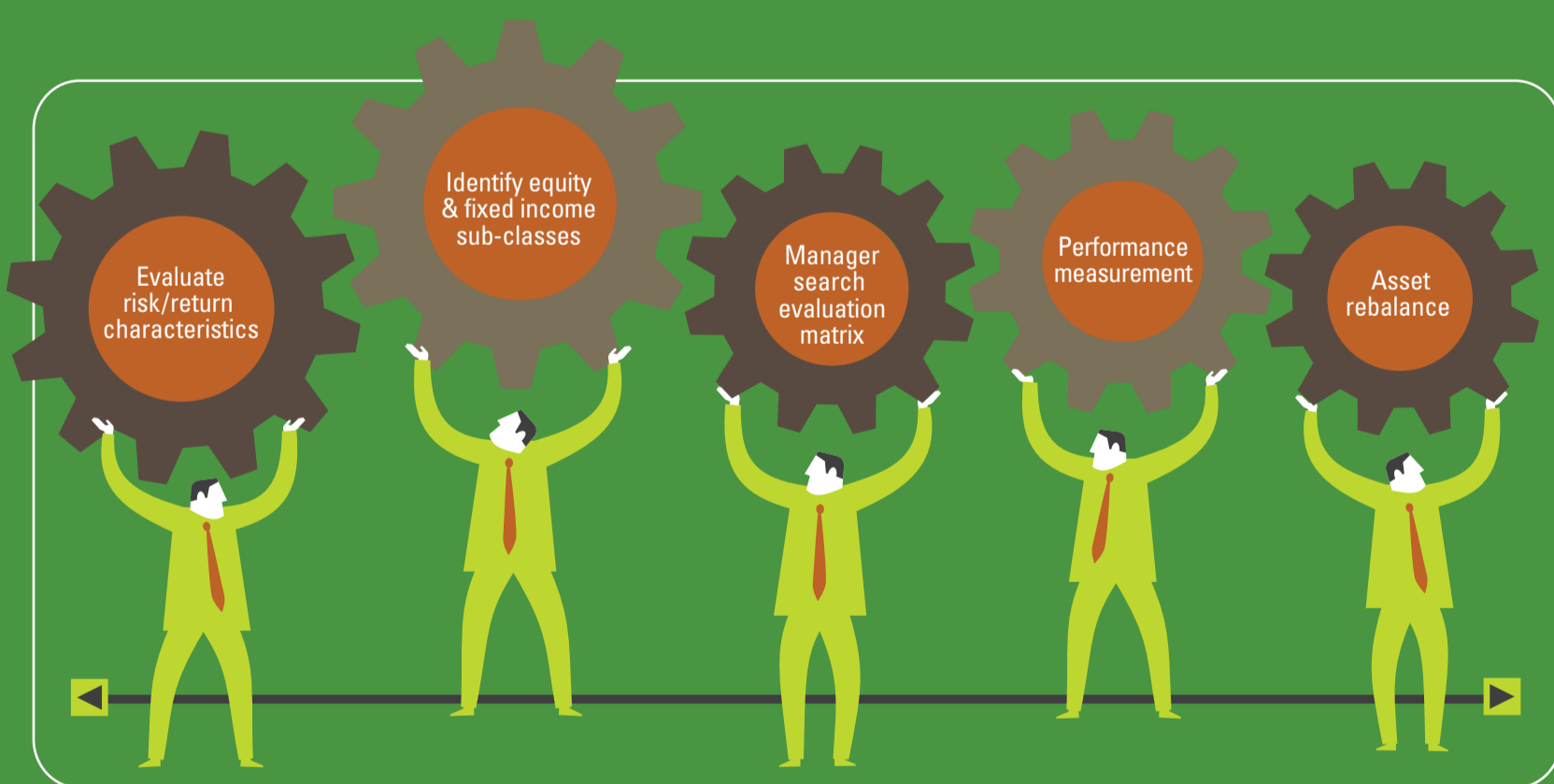
INSTITUTIONAL PRINCIPLES AND VALUES THAT MATCH WITH YOUR FINANCIAL OBJECTIVES



SEVEN STEPS : THE ADVICE PROCESS



DESIGN AND MANAGEMENT OF THE PORTFOLIO : WORKING FOR YOU



INVESTMENT PROCESS RECAP



Now make an informed decision!

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