



YOUR TEAM AT VANTAGE

by Kimberly R. Taylor

Do you remember in school when it came time to pick teams? Some of us were chosen right away while others, including me, waited, hoping we wouldn't be the last one chosen. Once the teams were picked, we pulled together, whether to conquer the obstacle course—win at tug of war or out spell at a spelling bee. Something about being on a team sharpened our focus. We learned that by rallying together towards a common goal, we weren't limited by our own abilities but rather what our combined talents could attain. As a team, we accomplished more than we ever could have on our own.

The team at Vantage is on your side. Making financial choices in our fast-paced world is easier with a team of professionals. Your financial concerns are reduced and your level of comfort increases when you know you don't have to tackle your financial decisions on your own.

The nice thing about teamwork is that you always have others on your side.

- Margaret Carty

WHY THE TEAM APPROACH?

The team approach helps you meet your financial goals and, even more importantly, your life goals. This strategy affords our clients a larger pool of knowledge and experience than working solely in a one to one relationship.

Personal attention is an important part of quality financial planning – that's why individual financial advisors (sometimes known as "solo practitioners") succeed. But what happens when your advisor is

unavailable, and you need assistance now? If you're working with our financial team, you'll be able to speak to another person and receive immediate assistance. We combine the personal attention of a dedicated financial planner with the benefits of a team environment, making you the winner in your financial strategy.



MEET YOUR TEAM PLAYERS

The most important team player is you - as a matter of fact, you are the key player and yes - the first chosen for the team. Isn't that nice to know? No matter how hard we strive to simplify your financial world, it can only be accomplished by working together *with* you. As a team we share the responsibility of monitoring your progress toward achieving goals.

Next we have your Team Captains, Michael Rohrwasser and Terry Kaul. Over the years they have put together a team which offers you more than 50 years of combined experience in the financial planning profession.

On offense, and easily recognized as the most familiar faces, are your Relationship Managers, Sam Swisher, Tom Vislisl and Sam Bakou. Scoring goals for your financial future is at the front of their list. On defense you will find Elizabeth Olson, Neil Dinndorf and Kimberly Taylor. For team support, we work to ease your paper burden, resolve technical challenges and even cheer from the sidelines as your goals are achieved.

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DOES IT REALLY WORK?

Teams are stronger, have greater endurance and sharper focus. You want to be a part of a team that keeps itself sharp and in tune with the constantly changing financial industry. You also want a team that is diverse in their knowledge and expertise. Do you need help with estate planning? How about an investment strategy personalized for your current and future goals? Maybe you would like to give your children the gift of financial coaching. Your team at Vantage can offer this and more.

Individual commitment to a group effort—that is what makes a team work, a company work, society, work, a civilization work.

-Vince Lombardi

Your financial plan benefits from teamwork as well. Relationship Managers meet on a weekly basis to go over financial plans as a team. You benefit from a wealth of knowledge and expertise pooled together to focus on the details while keeping your main objectives in mind.

Group effort makes our team work with you and for you. Best of all, you benefit from being part of a team while still maintaining a personal one-on-one relationship

with your Relationship Manager. Trust and confidence as well as a successful financial journey are the high scores when we rally together toward a common goal—your goals. And besides—it's just more fun this way.

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