Focus on your future

When you look out at the horizon what do you see?

Sunny mornings on the golf course?

Watching your grandchildren receive their college diplomas?

Visiting places you've always dreamed of?

Contributing your time and resources to help others?

When you think about your future, chances are it includes time for family, friends and you! And while life is always full of surprises, the last thing you want to worry about is money — who's watching over it, guiding your decisions and doing everything possible to ensure best outcomes?

Whether you're a small business owner or a professional, a real estate developer or a real estate investor, you've been successful and you want to protect your nest egg. Whatever your goals and vision for the future, CenterPointe Wealth Management can help you create a financial plan to help you realize your dreams. And because your circumstances and values are unique, the focus of our planning process is you.

When you look out at the horizon, we want you to see clear blue skies and a sea of flowers. As professional financial planning partners, we're ready to stand by you through all the seasons of your life.

Prosperity for Life

When it comes to living the good life today while planning for a comfortable retirement tomorrow, financial considerations coupled with your personal values and desires are an essential part of the mix. If you are looking for a professional financial advisor —someone who is interested in building a relationship with you and not just your money — CenterPointe Wealth Management may just be the right firm for you.

CenterPointe's comprehensive financial planning and wealth management services consider all aspects of your life — not just your money and financial assets. We'll help you define your objectives — both personal and financial —and develop a plan to help you achieve your goals.

Together we create prosperity for life – not just financial prosperity but whole life well-being. The center point is you: your dreams, your goals, your values.

Planning Financial Futures through Mutual Trust

In order to build a financial future around your unique dreams and circumstances, we have to really get to know you. We are committed to nurturing a deep, long-term relationship so that you can share important thoughts and details, with confidence, in a professional yet friendly setting. Trust is paramount in our work because it is only through mutual trust that we develop the kind of bond required to really know and serve you well.

At CenterPointe Wealth Management, we're focused not just on your present — but on your future. You are at the center of our work together.

Financial Planning Services

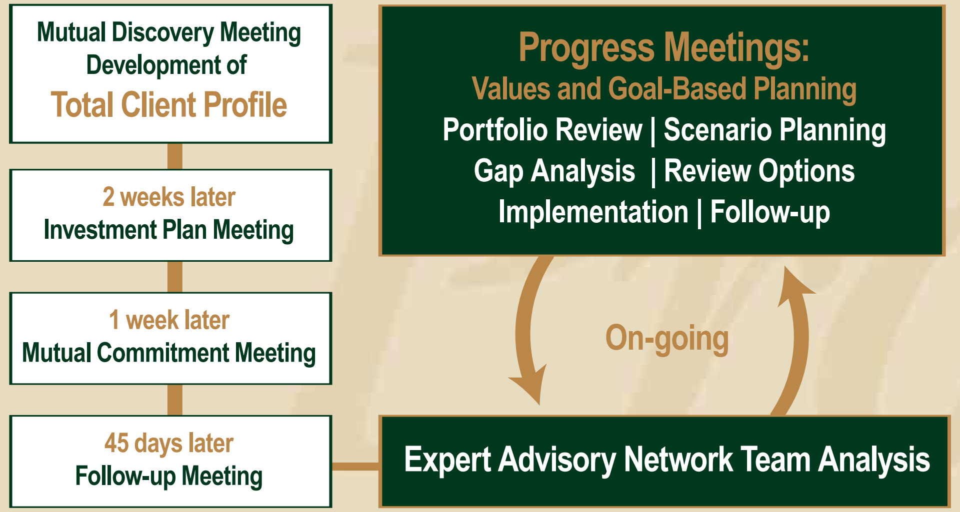
We take a comprehensive approach to financial planning that considers all aspects of your life. Together we define both your personal and financial objectives and develop a plan to help you achieve them.

Retirement Planning – We are committed to helping you make a confident transition into retirement. Proper planning, saving and investing, coupled with ongoing financial management and professional advice, can help you grow and preserve your assets. Whether you are in the accumulation or distribution phase, we will develop a strategy to support a long, comfortable, worry-free retirement.

Late Stage College Planning – If your means exceed the "need-based" scholarship levels, we have access to proprietary techniques that can help you reduce college expenses through a combination of academic, cash flow and tax strategies. The money saved can be redirected to retirement savings, creating a legacy and/or supporting charitable causes.

Estate Planning – This is a priority if you want your wealth to continue to benefit loved ones and favorite charitable causes. We'll help you structure a plan to ensure an orderly, tax-wise transfer of your wealth.

Investment Management – We offer custom-designed investment policies and ongoing portfolio management. Periodic reviews ensure the integrity of the portfolio and the continued viability of assets within it. We are committed to providing sound and conservative investment acumen



The Discovery Meeting is a chance to get to know each other and determine whether there is a good fit. From the information we gather at that meeting, we develop your Client Profile and review it at the Investment Plan Meeting. At that time, we present you with an initial investment plan that is consistent with your goals and your risk profile.

After you have had a chance to consider the plan, we reconvene for the Mutual Commitment Meeting, to which we ask you to bring the documents and paperwork we need to transition you into our investment family.

At the 45-day Follow-up Meeting, we review our initial implementation of the plan. We will also connect with your other trusted advisors (CPA, estate attorney, etc.) so that all of the members of your team are aligned on your behalf. Going forward, we continue to monitor your accounts and stay current on changes in your situation or needs so that the plan accurately reflects them at all times.

John Barton, founder of CenterPointe Wealth Management, is a seasoned financial services practitioner with over 20 year's experience. His professional focus is providing integrated financial and life management services tailored to each client's unique objectives. As a consultant for those preparing for or just entering retirement, John is committed to enhancing the financial and mental well-being of his clients.

Prior to his career in the financial world, John gained valuable experience working as a licensed clinical social worker (LCSW). His professional counseling experience and extensive financial training support his genuine gift for guiding people through the complexities related to investment selection and money management.

John completed the demanding requirements to become a CERTIFIED FINANCIAL PLANNER™ professional through the Certified Financial Planner Board of Standards, Inc. in 1990. He has appeared on WIBW news and has been quoted in various publications on financial planning issues. A graduate of Wichita State University with a BA in psychology, John received his Masters in Social Work from the University of Kansas.

CenterPointe Wealth Management

Prosperity for Life

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