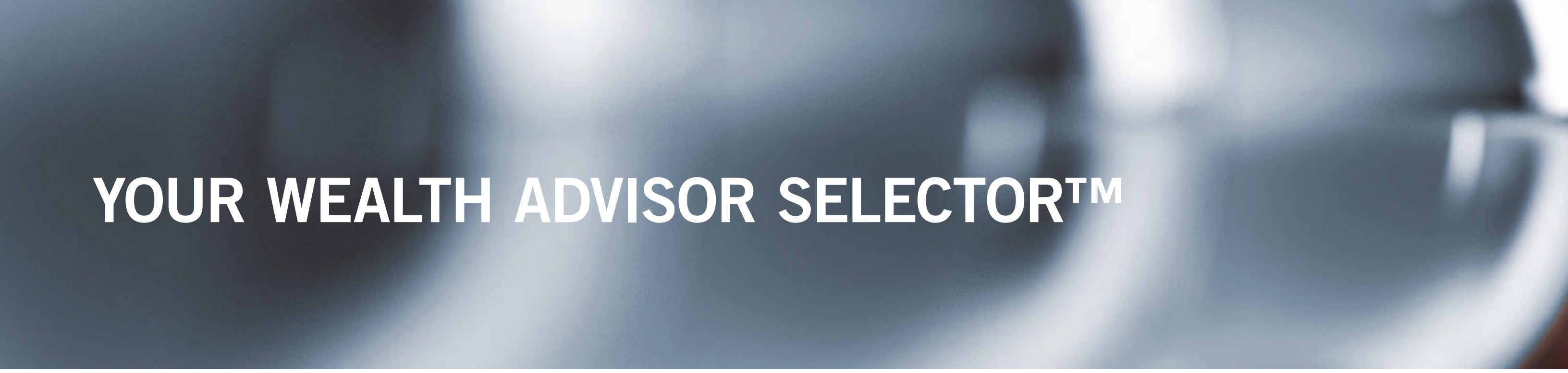
the LATREMOILLE Group

RICHARDSON GMP

YOUR WEALTH ADVISOR SELECTOR™ QUESTIONNAIRE



YOUR WEALTH ADVISOR SELECTOR™

This questionnaire will help you to gather information and evaluate prospective advisors. As you interview each advisor, ask these key questions, then compare the answers to select the best advisor for you.

Advisor 2 ....

Advisor 3 ....

What special qualifications and experience do you have?

The Latremoille Group	Advisor 2	Advisor 3
☑ 30 years industry experience		
☑ IDA Award of Distinction		
☑ MBA, CIM, FSCI		
☑ Insurance License, Levels I & II		
☑ Portfolio Manager		
☑ Author of three books		
☑ Scored an aggregate total of 4.9 out of 5		

What do you do that is different from other advisors so that I should work with you?

The Latremoille Group	Advisor 2	Advisor 3
☑ Team approach with high staff to client ratio		
☑ Individually customized solutions, portfolio, and reporting		
☑ All market resources available		
☑ Holistic and integrated approach (tax, estate, insurance, succession, charitable giving)		
☑ Proactive work with your other key advisors		

What level of service can I expect?

The Latremoille Group	Advisor 2	Advisor 3
☑ Regular customized progress reviews		
☑ Prompt response to phone calls and emails		
☑ Quarterly summary reports, monthly account activity reports, and 24/7 online account access		

What about results / returns?

The Latremoille Group	Advisor 2	Advisor 3
☑ Our process ensures that return expectations are matched to your risk tolerance, time horizon, and objectives		
☑ Guidance through different periods in the financial market		

How do you charge and how much can I expect to pay?

The Latremoille Group	Advisor 2	Advisor 3
☑ All inclusive, fully-disclosed, competitive fees reflecting your individual needs and industry norms		

How many clients do you have and what are your total assets under management?

The Latremoille Group	Advisor 2	Advisor 3
☑ 100 +families and over $325 million		

What is your typical client size?

The Latremoille Group	Advisor 2	Advisor 3
☑ Clients range in size from $2 million to $50 million in assets under management		

Do you have a team? If so, what size?

The Latremoille Group	Advisor 2	Advisor 3
☑ Yes — six professional, long term team members, plus all the resources of Richardson GMP		

CONTACT US

We understand your needs and are dedicated to serving them with distinction. In all we do, we strive to reward our clients for placing their trust in us.

Live life. On your terms.

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