



Expert estate planning services are an Amicus specialty. Our estate specialists review your current plan, ensuring it's appropriately designed

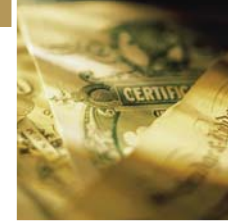
and reflects your current wishes, factoring in tax reduction and business succession strategies. We assist you with your most sensitive issues, like selecting guardians for your children, ensuring a designated person will handle your financial affairs if you become unable to do so, and planning for after you're gone. We confirm that beneficiaries named on your pensions, retirement accounts, insurance policies, and trusts are up-to-date.

If your documents need updating, we work with your estate attorney to coordinate your estate plan with your overall financial plan. If you do not already have an estate attorney, we can help match you with one. At your request, we provide financial statements and family information to your attorney so that the time you spend together is more keenly focused on your needs and those of your loved ones.

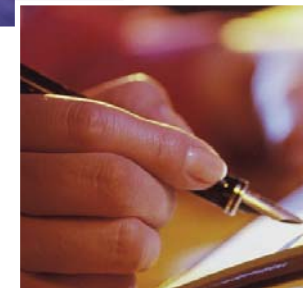
We understand estate planning from your perspective — and your family's. Our specialists are prepared to manage the financial and emotional aspects of your unique estate planning needs and will offer unbiased advice, trusted service, and a caring support system as you make these delicate life decisions.



4216 102nd Street  
Lubbock, TX 79423  
(806) 698-1122  
(888) 8AMICUS  
(806) 698-8047 fax  
[www.amicusadvisors.com](http://www.amicusadvisors.com)



# Financial Planning For Your Future



Planning

Today To

Build Better

Tomorrows

AHEAD



## Comprehensive Financial Advice... Your Concerns, Amicus Solutions

You want financial solutions backed by unparalleled expertise. Look to Amicus Financial Advisors LLP, founded with the Texas community — our family, friends, and neighbors — in mind. The Amicus team is a diverse group of CFP® practitioners, attorneys, and other specialists. We offer caring, competent service and strive to maintain a lifelong relationship with each client. Amicus experts can help you with the most important aspects of your financial life, including comprehensive financial planning, tax reduction strategies, investment management, insurance services, creative mortgage products, estate planning, and business succession solutions.



## Amicus Financial Advisors LLP Your Prudent Financial Friend

We listen to you. Once we get to know you and what is important to you in life, we can develop a comprehensive plan for achieving your goals. This plan will include smart strategies to improve your financial life by reducing risk, increasing investment returns, and using sensible ways to save money on insurance, taxes, and expenses. As your prudent financial friends, your Amicus advisors apply their talents and expertise to help you achieve your financial goals.

## The Amicus Approach To Stewardship Comprehensive Financial Planning, One-On-One Relationships

Your Amicus team adheres to The Golden Rule — we treat you as we would want to be treated. We go at your pace, never pushing or selling, offering real-life solutions in language you understand. Your goals become our goals, and our success depends on the degree of financial peace you feel as you progress toward your milestones. We recognize the honor of being entrusted with your personal information and your family's financial future. We find joy in helping you achieve financial freedom so you can enjoy all that life has to offer, worry-free.

## Prudent Investment Management Reduce Risk, Preserve Capital, Achieve Your Goals

We use the 10-step Amicus asset management process to maximize expected after-tax return, taking into account your risk profile. Your Amicus advisors put together a personalized “investment policy statement” (IPS) and an investment dashboard, forming the strategic framework to focus our efforts on diversification, asset allocation, and minimizing expenses and taxes. The IPS guides our selection of securities and sets guidelines for future actions. Your investment dashboard — an Amicus exclusive — empowers you to easily monitor your progress toward your goals. Your ability to sleep at night, knowing your future is safe and your investments are productive, drives your Amicus team.