Dopkins & Company, LLP
CERTIFIED PUBLIC ACCOUNTANTS AND CONSULTANTS

DOPKINS CLEAR VIEW SOLUTION

COMPREHENSIVE. PROACTIVE. FORWARD-LOOKING.

Tools to BUILD wealth, PROTECT assets and TRANSFER a legacy

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An article published in the Harvard Business Review investigates the complexities of success. While researching data for *"Success That Lasts,"* the authors found that there are four irreducible components of enduring success:

1. **HAPPINESS** (feelings of pleasure or contentment about your life);
2. **ACHIEVEMENT** (accomplishments that compare favorably against similar goals others have strived for);
3. **SIGNIFICANCE** (the sense that you've made a positive impact on people you care about);
4. **LEGACY** (a way to establish your values or accomplishments so as to help others find future success).

Take away one component and it no longer feels like "real" success.

>> In our experience working with people who achieved personal, professional and financial success, a key challenge they face is maintaining a clear view of where they stand financially. Without a clear view, the ability to develop strategies that focus on building, protecting and transferring wealth is put at risk, as is each of the components of enduring success. <<

OUR SOLUTION

We've developed a fully-integrated financial planning solution that draws upon the collective expertise within our firm while utilizing the latest technology. Our wealth management advisors, tax experts and risk management specialists collaborate to provide you with comprehensive, proactive, forward-looking planning and analysis of your financial holdings using real-time data. Features include:

- Aggregation of all financial holdings
- Financial planning (cash-flow analysis, expense management, tax planning, college planning, retirement planning)
- Investment analysis (Advise the Advisor)
- Estate planning
- Vault for key documents
- Smartphone App provides one-touch access

DOPKINS CLEAR VIEW SOLUTION

BENEFITS TO YOU

- We aggregate all financial holdings to provide a clear picture of your current net worth and to update amounts and monitor change in real-time.
- For those with multiple investment advisors – we are able to serve in an "Advise the Advisor" capacity and provide objective advice through detailed analysis of all investment accounts relative to performance, concentration of risk, cash flow and cost.
- We provide more timely identification of opportunities to maximize, protect and transfer your wealth.
- Our clients have informed us this solution allows for real time monitoring of investment portfolios, increasing comfort that any anomalies with the account can be identified and rectified in a more expeditious manner.

WHO NEEDS THIS SERVICE?

- Business owners who are accumulating wealth and have limited time to focus on their own strategic financial planning and analysis.
- High net-worth individuals who utilize multiple investment advisors
- Baby boomers who've accumulated wealth and are considering:
  - An exit from their business (liquidity event)
  - Estate Planning
  - Wealth transfer strategies
- Sole provider or complex estate concerned about how to organize information

QUESTIONS FOR YOU

- Do you know what your net worth is today?
- What assets comprise your net worth and what is each asset's % of the total?
- Is your net worth going up at an acceptable rate to provide for your current needs, your retirement and your family's financial security?
- Do you know and understand the risks to protecting your net worth?
- Would you find value in being able to aggregate all of your holdings in one place to provide a clear picture of where you stand?
- Would you find value in being able to monitor real-time changes to the value of your holdings and being able to make more informed decisions relative to your holdings in a more-timely manner?
- Are you comfortable that you have a secure way of monitoring your investment portfolio on a real-time basis?
- Are you considering building an organizational structure to assist with monitoring your investment portfolio?

YOUR TEAM

FOR MORE INFORMATION ABOUT DOPKINS CLEAR VIEW SOLUTIONS, PLEASE CONTACT:

Thomas R. Emmerling, CPA, CFP, CGMA

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Managing Member, Dopkins Wealth Management, LLC*
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Tom Emmerling has the overall responsibility for the operation and management of the firm. Capitalizing on his 40 years of experience as a certified public accountant and certified financial planner, he works to continuously develop strategy and improve the firm's processes and suite of services.

* Dopkins Wealth Management, LLC is a registered investment advisor owned by the partners of Dopkins & Company, LLP.

Albert A. Nigro, CPA, CVA

Partner, Tax Advisory Group
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Al provides accounting, tax and consulting services for privately held companies, and consults on: business start-up and entity formation, financing coordination, design and implementation of financial accounting and reporting systems, income tax planning, estate tax planning, succession planning and business valuation.

Al serves clients in a variety of industries. His areas of specialization include health care, focusing on medical practices, providing services including strategic planning, operational consulting, income tax planning and business valuation. Al also specializes in serving life science companies and provides services for companies at all stages of development, including start-ups. Services Al provides include the development of business plans, financial projections and business valuation.

Gregory J. Urban, CPA, CVA

Partner, Tax Advisory Group
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Greg's main focus is on providing tax consulting, compliance and valuation services to privately held businesses and their owners.

He has extensive experience advising clients on complex tax compliance issues, including tax credit optimization, mergers and acquisitions. In addition, Greg performs and consults on a variety of business valuation engagements, including valuations relating to transfer tax issues and purchase price allocation issues. Greg also represents clients before the Internal Revenue Service and various state taxation departments.

Teresa M. Majors, CPA

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Teresa works with local public and private companies providing assistance with tax compliance, tax provision issues, Sarbanes-Oxley compliance, and FIN 48 implementation. She has broad based experience including working with both public and private companies and their executives and owners. She has extensive experience with multi-state corporations, consolidated return issues, mergers and acquisitions, and tax provision issues.