Sagemark Consulting Private Wealth Services – The Essential Resource

Sagemark Consulting Private Wealth Services (SPWS) is an essential resource for financial planners who are classified among an elite group within the Lincoln Financial Advisors/Sagemark Consulting organization nationwide. This elite group specializes in working with clients and wealthy families in the $5 million plus net worth marketplace. SPWS seeks to help financial planners improve the quality, case design and overall value they deliver to this specific market segment. Sagemark Consulting Private Wealth Services offers their membership of financial planners the following services:

- **Personalized Client Case Review and Design Consortium:** By utilizing the expertise of the SPWS staff and special advisory specialist team, SPWS planners are able to deliver a consortium-level approach to your financial planning design that will holistically address the complexities that exist in your personal situation. The combined experience of this group far outweighs that of many competitors in the industry. More importantly, financial planning is our only business. We do not offer services in the various other disciplines that many firms claim to support – such as investment banking, tax and business consulting or legal representation. Thus you receive focused, critical, team attention for your financial planning needs that is difficult to match.

- **Technical Human Support:** In our technologically driven world everyone has a “proprietary” approach to financial planning. Lincoln Financial Advisors/Sagemark recognizes the fact that in the high-net worth marketplace technology is a tool, but not the solution. Your SPWS planner collaborates with the SPWS Staff and our National Design Team to develop not only strategies, but tangible, implementable solutions that address your unique needs. During the process you may have the opportunity to interact with one of these individuals/resources via web conference, video conference or in-person in one of our regional offices. Either way, you can rest assured that your situation is being addressed by a qualified, credentialed and competent group of individuals who stand ready to discuss and illustrate their recommendations in real-time, not only in cyberspace.

- **Action Orientation:** There are numerous professional advisors who cater to the needs of the high net worth community. Still, many of these “consultants” may be steeped in theories and concepts that may or may not proceed to deliverable results. As a successful person you are, by nature, a person of action. At Lincoln Financial Advisors/Sagemark we believe that a financial plan in and of itself has no power or force without implementable actions that change your situation as appropriate to help you toward your goals. Our action orientation drives us to deliver to you multiple options we can assist you in implementing, each with a quantifiable outcome. You are the judge of your own destiny, but we will give you the tools to decide your fate both today and in the future. All of our recommended actions will be illustrated in a clear and concise way, which is supported by our SPWS structure.

- **Concierge-Level Attention:** As the client of a SPWS member planner, you are special to us. We value your business and will cater to your needs and requests in a manner that earns your respect. Our response will be timely, efficient and dependable. You will have multiple points of contact at any given time in the financial planning process and you can count on us to drive the process at a pace that is appropriate to your particular situation and needs. Our relationship will evolve, as will your financial plan, but you will always be treated to a timely, concierge-level experience from complex issue to minute detail.

Sagemark Consulting℠
Private Wealth Services