

What to expect of your relationship with The Proper Analysis

Financial Review - Together we'll conduct a thorough review of your current holdings to guide you in the selection of an asset allocation strategy best suited to help you reach your future financial goals. Think of it as an exercise in working toward focus and fiscal fitness.

Investment Policy - Together we'll craft a written investment policy to clearly express your time horizon and tolerance for risk. By using this plan, we can gauge whether we're on track and know when adjustments to your portfolio may be needed to assure you of a greater possibility for success.

Ongoing Communication -

- Quarterly performance statements from The Proper Analysis
- Monthly statements and trade confirmations from your custodian

Continual Monitoring of your portfolio's holdings as well as quarterly rebalancing, if necessary.

Personal Meetings and Telephone Updates are welcomed as frequently as you want or need. These meetings can be called to discuss changes in your life or your feelings about taking risk, changes you want to discuss in your overall investment plan or changes in your financial circumstances. We are happy to answer your questions or concerns about current market conditions or about specific holdings in your portfolio.

Communication is welcomed and encouraged. Please know that we have long-standing relationships with professionals who have extensive knowledge about estate planning, tax planning, retirement planning and accounting when you wish to address your needs in any of these areas.

For More Information

- We invite you to **request a copy of our Form ADV** (Investment Adviser Registration), which is on file with the Securities and Exchange Commission
- We invite you to **request further information**
- We invite you to **call us** at **(216-595-3842 or 800-571-0935)** to set up a **complimentary appointment** or **conference call**
- We invite you to **e-mail us at:** Ineely@properanalysis.com
- We invite you to **visit our website:** www.properanalysis.com

From the day The Proper Analysis was founded, we have maintained a fee-only status which enables us to provide uncompromising, independent, objective advice for our clients.

If you are interested in building a relationship with a firm that is committed to your interests – always – a firm with proven experience and a depth of credentialed professionals, we encourage you to explore working with The Proper Analysis.