



**- A WINNING RELATIONSHIP -
YOU and FILOMENO WEALTH MANAGEMENT, LLC ("FWM")**

FWM'S PRIMARY ROLES:

- Investment advisor
- Tax advisor
- Team leader
- Financial coach
- Trustee

OUR SERVICES AND VALUE TO CLIENTS DIFFERENTIATES FWM IN THE MARKETPLACE:

PROVEN FINANCIAL COACH

- Influence client expectations and investment behavior through education provided by experienced, credentialed and trusted advisors
- Provide income, estate and financial services that are integrated with our clients' investment plans
- Coordinate the services and involvement of our clients' other trusted advisors
- Trusted and trustworthy

PERSONALIZED INVESTMENT PROCESS

- Empower clients through investment education
- Develop personalized investment plans utilizing a written Investment Policy Statement to document clients' goals and financial information
- Implement long-term investment plans that focus on asset allocation, diversification and expense reduction
- Large firm resources - small firm service

INDEPENDENT AND OBJECTIVE ADVICE

- Compensated only for our advice - not for the products we recommend
- Registered investment advisors - not broker dealer representatives
- Investment advisors - not asset gatherers



FWM'S CREDENTIALS AND EXPERIENCE:

- FWM is registered with and regulated by the U. S. Securities and Exchange Commission ("SEC")
Form ADV is available at www.adviser.sec.gov
- Our professionals hold two or more of the following graduate degrees and professional designations:
 - Certified Public Accountant
 - Juris Doctor
 - Personal Financial Specialist
 - Masters in Business Administration
 - Masters of Science in Personal Financial Planning
- Thibodeau Financial Advisors, LLC, a registered investment adviser and the predecessor to FWM, was formed in 1992.
- FWM is owned by Filomeno & Company, P.C., Certified Public Accountants, was established in 1966 and is an independently owned member of the RSM McGladrey Network.
- FWM currently provides investment management to clients located in 10 different states with investments of over \$80 million. In general, our minimum account size is \$500,000.

For more information, please contact:

Richard E. Thibodeau, CPA/PFS, JD
Managing Director
Filomeno Wealth Management, LLC
860-760-7044
ret@filomenowealth.com

Michael A. Tedone, CPA/PFS
Director and Chief Compliance Officer
Filomeno Wealth Management, LLC
860 -760-7017
mat@filomenowealth.com

Or visit our website at www.filomenowealth.com