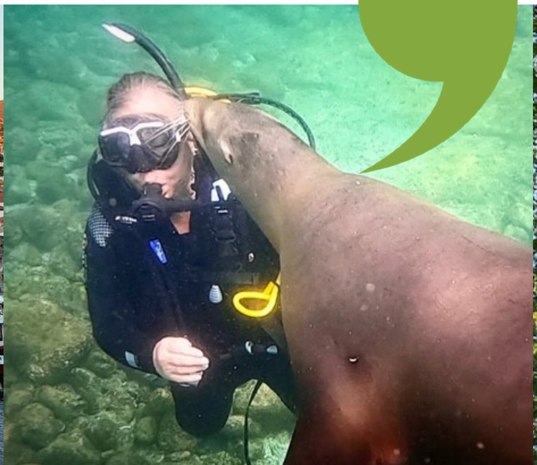
Money Simplified.

Financial Planning Services

TWO WEST
MONEY SIMPLIFIED

In the ordinary, we find the extraordinary. Led by Two West Advisors, the path to financial wisdom becomes remarkable. Their approach was refreshingly simple, their advice was fun to implement, and their innovative strategies were a game-changer for my financial future. They didn't just advise, they guided me towards prosperity and have become part of my family.*

–Tony G. Olathe, KS



Your Dedicated Team

Marko Ungashick, AIF
CEO | "The Rock"

Ryan Rink
President | "The Connector"

Vern Cushenbery, CFA, CPA
CIO | "The Wonk"

Bryan Montemurro, CFP®
Financial Planner
"Mayor of Income Town"

Mike Curran
Financial Planner
"Swiss Army Knife"

Chris Ratigan, CFP®
Financial Planner
"The Strategist"

Andy Mich, CFP®, QPA
COO

Tim Jansen, CFP®, QKA, QPFC
Financial Planner

Amber Kanzenbach, CFP®
Financial Planner

Stephanie Smith
Operations Manager

Kyle Harris
Plan Consultant

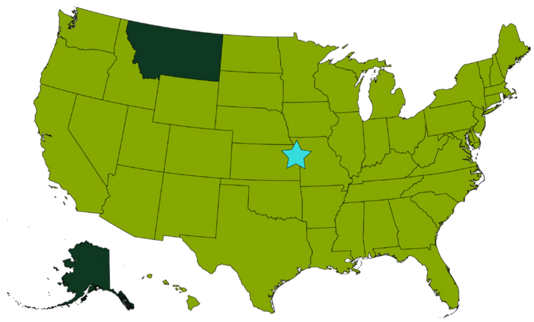
Scott Eggers, AIF®, CPFA®
Plan Consultant

Investing in People

To invest in people — personally, financially, and/or spiritually. It's important our clients understand our 'why' . . . why we do what we do? Bottom-line, we are investors, but we invest in people. We invest in relationships. We invest financially. But we also invest personally, even sometimes spiritually. We believe those investments pay off in richer, fuller, more meaningful lives for us and those we serve.

We are experienced.

Our team of advisors has been serving clients since 2001.



Denotes Two West Clients

We are growth-oriented.

We currently serve clients Nationwide and were recently named a top 50 fastest-growing businesses by the Kansas City Business Journal.

We are independent.

We are not captive to a larger parent company, proprietary products, production quotas, or other conflicts of interest that may influence our advice. We are able to identify and invest with some of the most prominent institutional investment managers in the world.

We are client-focused.

We have been strategic in our growth in order to protect the quality of service we provide. We seek long-lasting relationships that extend to multiple generations. All aspects of our business are designed with the client in mind.

We are accountable.

As a Registered Investment Advisor (RIA), we are registered with the Securities and Exchange Commission and regulated by the Investment Advisers Act of 1940. Unlike many brokers and financial advisors who are only held to a suitability standard, we also act as a Fiduciary and as such, have an undivided loyalty to our clients.

We are celebrated.

KC Business Journal:
KC's Fastest Growing Companies

Top Wealth Management Firms

How We Invest

Simplify. Educate. Give.

At Two West, we believe in education. We take complex ideas and simplify them. Then we give that away. Our clients choose to hire Two West to execute those ideas. Our comprehensive approach provides value by increasing the likelihood of achieving your desired outcome. We don't just offer advice; we immerse ourselves in each client's unique narrative, aspirations, and life experiences, to craft financial plans that are not only practical but attainable.

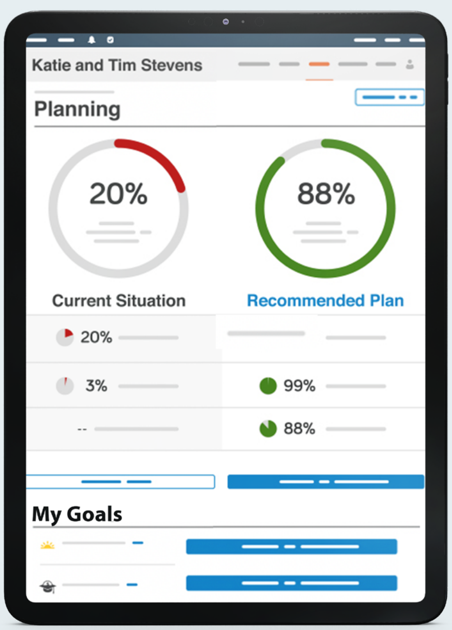
Financial Planning

Live the life of your dreams in 3 simple steps.

1. Get clear on what's really important to you.
2. Implement a plan that prioritizes your goals.
3. Lean on Two West for accountability and guidance.

Life is complicated. We're all trying to stay on top of our competing financial goals while juggling today's challenges at the same time. Getting a financial plan in place can help alleviate the stress of knowing if you're on track for your goals, or are moving in the right direction to achieve them. Two West is here to help, no matter your situation.

- Income Strategies
- Wealth Preservation
- Retirement Planning
- Scenario Analysis
- Insurance
- Healthcare
- Charitable Giving
- Wealth Transfer
- Social Security
- Client Portal powered by eMoney



Introducing Goal Based Financial Planning

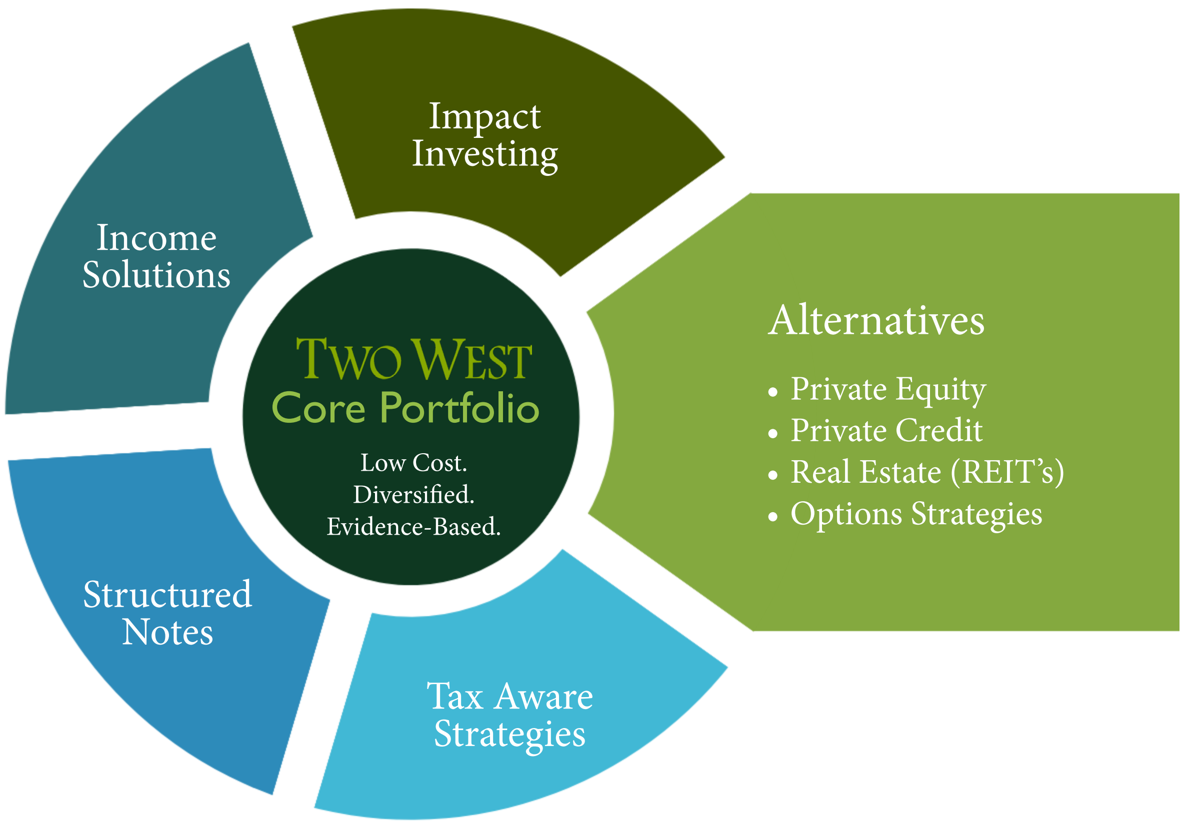
Financial planning just got personal. Say hello to our intuitive, goals-based approach that streamlines your progress and helps you reach your financial targets—for retirement, education, spending, and more.

- Clear, Simplified Plan
- Interactive Goal Tracking Tools
- Side-by-side Scenarios
- Mobile and Tablet Responsive
- Safe and Secure

Portfolio Management

Core/Satellite Investing

Our approach to Portfolio Management centers on building relationships. We continuously collaborate with you to align your wealth goals, risk tolerance, income needs, anticipated expenses, and financial milestones, crafting a customized asset allocation strategy.

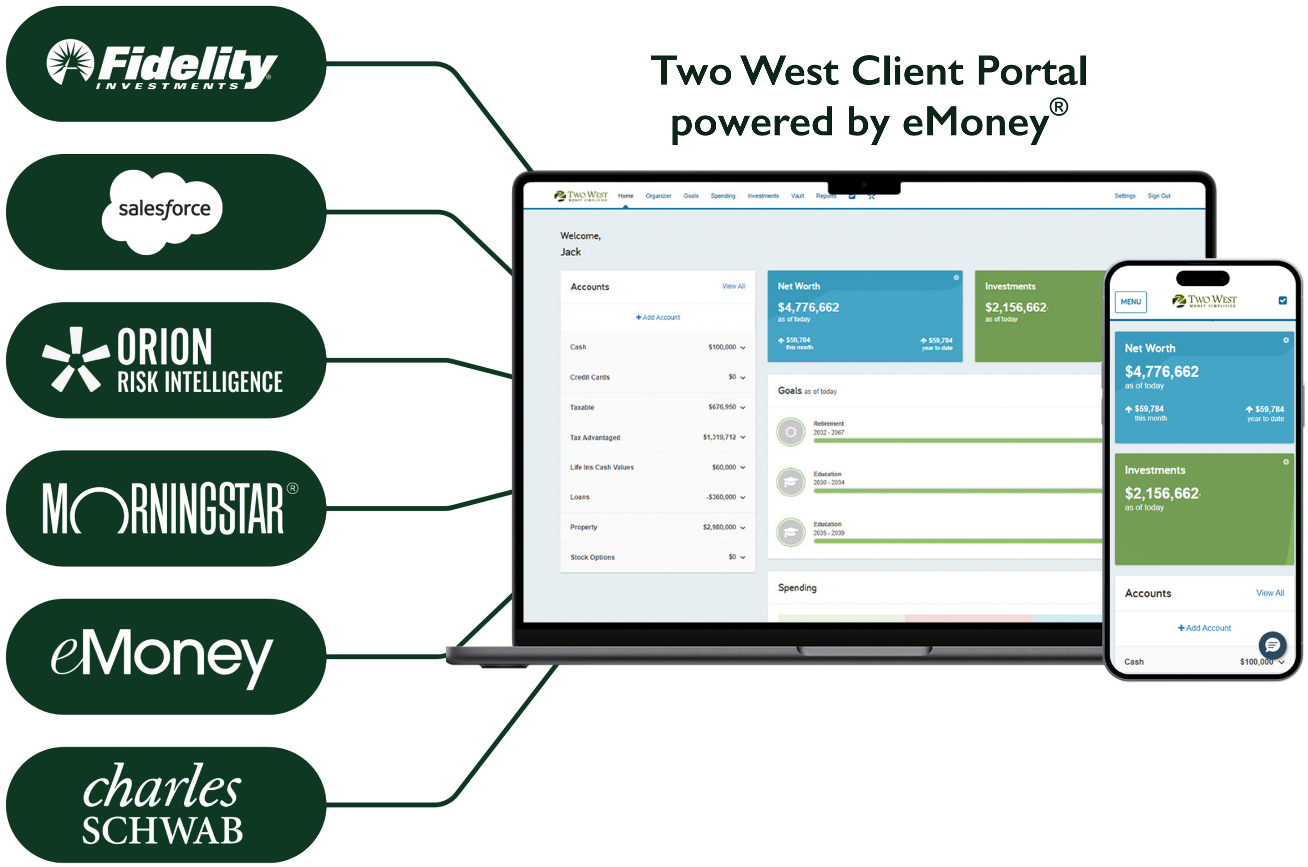


Core Portfolios Options:

- Standard: Allows for greatest flexibility
- Bundled: for <$400,000 accounts–Lower trading costs, but limited flexibility
- Socially Conscious

Technology

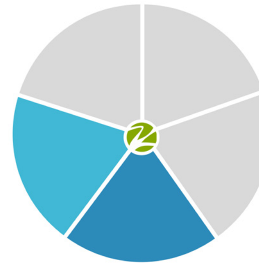
The Two West Client Portal, powered by eMoney® is a cutting-edge financial planning software that revolutionizes the way our clients manage their financial lives by providing a comprehensive view and empowering them to make informed, proactive decisions at their convenience.



Safe & Secure

Our Client Portal employs the most advanced security features and protocols to keep your data safe, private and secure, 24/7/365. Comprehensive security protection measures include password protection, secure socket layer encryption, firewalls, intrusion detection, audits, inspections and more. You can be confident that your important information is safe and secure with Two West.

Education & Client Experience



Two West is committed to providing you with an exceptional experience, offering monthly newsletters, informative workshops, quarterly market updates, on-demand one-on-one planning sessions, in person client events, and an array of additional services.

Sample Calendar

January	February	March	April	May	June
Annual Performance Review	Capital Gains Tax Reporting Summary	Monthly Newsletter	Financial Planning Check-in	Monthly Workshop	Monthly Newsletter
Monthly Newsletter	Monthly Workshop	In-Person Client Event	Monthly Newsletter	One-on-One Financial Planning	Quarterly Market Update
Portfolio Review / Goals Check-in	Update Financial Planning Projections	Monthly Workshop	LIVE Workshop Understanding Medicare with Guest Speaker	Monthly Newsletter	Quarterly Performance Report
LIVE Workshop Start the Year Strong: Budgeting	One-on-One Financial Planning	Quarterly Market Update		In-Person Investing Workshop	Monthly Workshop
	Monthly Newsletter	Quarterly Performance Report	Tax Review		Annual Estate Review

July	August	September	October	November	December
Portfolio Review	Monthly Workshop	Monthly Newsletter	LIVE Workshop Traditional IRA, Roth IRA, SEP IRA... What's Right For Me?	Monthly Workshop	Monthly Newsletter
Monthly Newsletter	In-Person Client Event	One-on-One Financial Planning		End of Year Tax Planning	Quarterly Market Update
Risk Assessment Check-in	Monthly Newsletter	Quarterly Performance Report	Monthly Newsletter	In-Person Client Event	Monthly Workshop
LIVE Workshop Beyond the Basics: 529s, College Funding & FAFSA	Mid Year Performance Review	Quarterly Market Update	Annual Insurance Review	Monthly Newsletter	Quarterly Performance Report
		Monthly Workshop			

Services Overview

LOW Complexity* HIGH

$0 AUM $1M+

Investment Management			
Future Target Models (Virtual Advice)	x	x	x
401(k) Allocated Recommendation	x	x	x
Multiple Manager Sleeved Investment Management		x	x
Access to Structured Notes		x	x
Access to Alternative Investments (Private Equity/Credit)			x
Access to Custom Indexing Portfolios			x
Collateral Based Borrowing Lending			x

Meeting Schedule			
Virtual On-Demand Coaching	x	x	x
Annual Financial Planning	x	x	x
Semi-Annual Financial Planning			x

Yearly Financial Planning			
Foundational Financial Planning (>2 hours)	x	x	x
Up to 5 hours of Financial Planning (3 Scenario Model)		x	x
Unlimited Financial Planning (Unlimited Scenario Models)			x

Service Commitments			
Quarterly Market Update	x	x	x
Custodian Account Access	x	x	x
Meeting Location - Virtual Only	x	x	x
Meeting Location - Virtual or In Office	x	x	x
Personal Finance Dashboard with Account Aggregation	x	x	x
Identity Theft Insurance			x
Assistance with Outside Professionals			x

*For illustrative purposes only. Circumstances can vary.

Annual Fee Schedule

Total Household Assets Under Management		
$ -	$ 250,000	1.25%
$ 250,000	$ 500,000	1.20%
$ 500,000	$ 2,000,000	1.00%
$ 2,000,000	$ 5,000,000	0.85%
$ 5,000,000	$ 10,000,000	0.80%

Your money, simplified.

twowestadvisors.com

(913) 825-1722 | Office

10975 Benson Drive
Overland Park, KS 66210

*Testimonials and endorsements are from individuals who are clients of Two West Capital Advisors, LLC. No cash or non-cash compensation has been provided in return for comments made by these individuals.