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Services

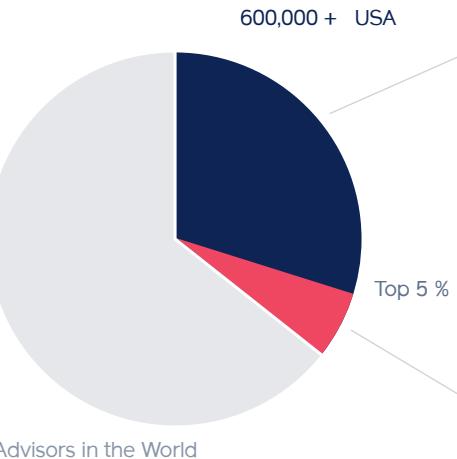
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Are you getting the right financial advice?

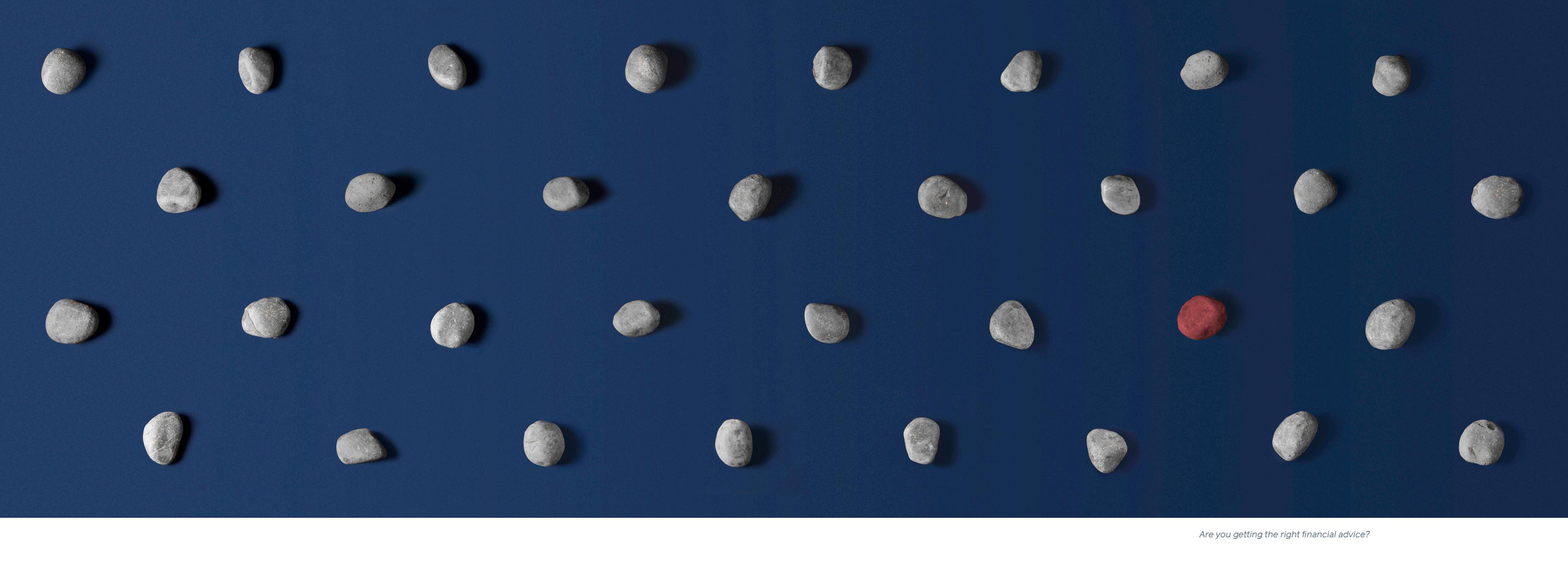
There are more than 600,000+
Advisors in the United States.



Moenio helps you navigate the client-advisor relationship,
and improve understanding and confidence in how your
interests and wealth is being managed.

*Is your Advisor among the **best**?*





Are you getting the right financial advice?

How we serve our clients.

At Moenio, we recognize the difficulty of finding the right financial advisor or evaluating an existing advisor. How do you know an advisor is among the best, delivering the great service and performance you deserve?

Capitalizing on decades of wealth management experience and expertise, Moenio created a proprietary evaluation process that provides clients unsurpassed guidance in finding, evaluating and monitoring their financial advisor.

Let us show you how we can help.



Find.

Evaluate.

Monitor.

Finding an Advisor.

How do you make the right choice?

When choosing an advisor, you face a number of important choices. Finding the best match requires asking the right questions to gain insight into an advisor's investment approach, return performance, credentialed expertise, fees, experience, size and scope of practice, type of clients, and more.

Moenio capitalizes on its expert knowledge of the industry to find the right advisors and firms, tailoring each search to our client's need and goals.



Find.

Second Step

Contact Firms

Reach out to the firms agreed upon to find their top advisors. Use the client profile as a guide for selection.

Goal

Fourth Step

Meet the right advisor

In a more thorough interview process we introduce the client to the advisors where we examine fees, investment decisions, the financial planning approach, and more to find the right Advisor.

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First Step

Meet with the Client

Understanding the Client:

- Desired location of Advisor
- Past advisor experiences
- Expertise required
- Family dynamics
- Client goals

And more to create the right profile so the firms and their advisors will have clarity on the needs of our client.



Third Step

Narrow from Ten to Top 3 Advisors

Conduct an in-depth evaluation examining performance (1, 3, 5 year returns), investment process, advisor/team credentials, and expertise.



Second Step

Contact Firms

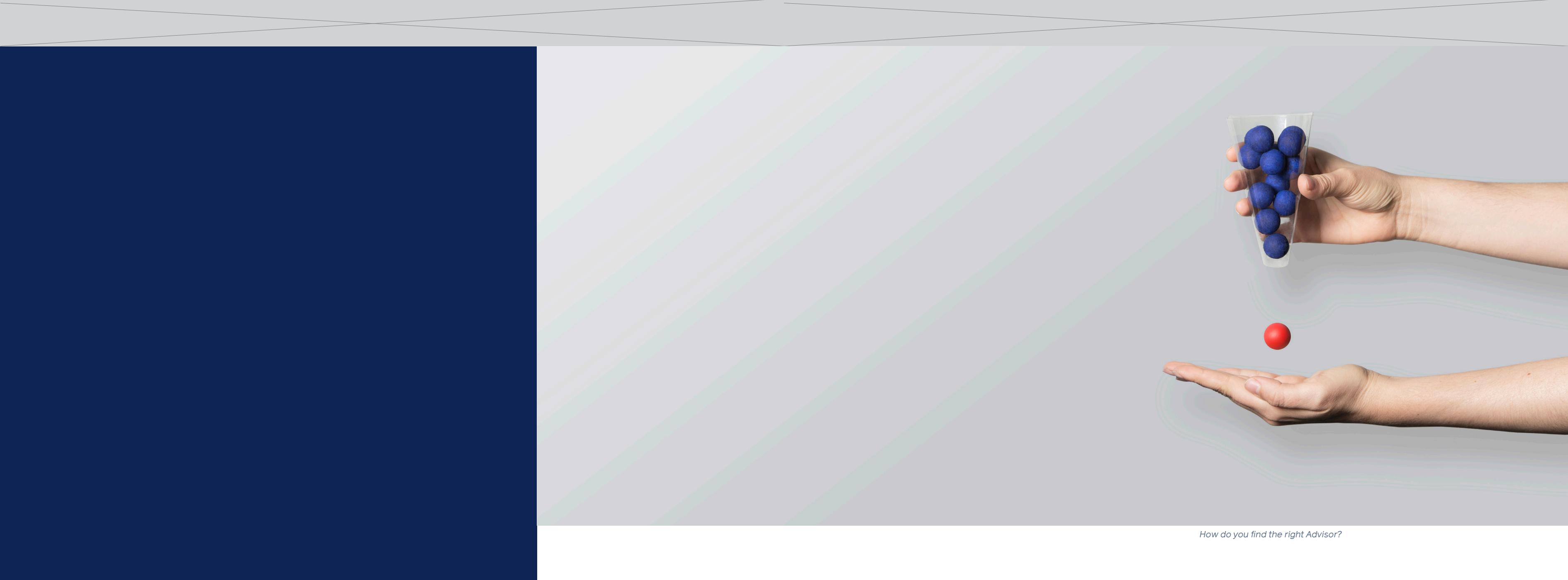
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Fourth Step

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How do you find the right Advisor?

Which Financial Advisors are Best?

Moenio values excellence across four aspects of an advisor's practice:

- **Consistency**
- **Communications**
- **Fairness**
- **Proactivity**

The **Best Advisors** deliver consistent advice focused on meeting or exceeding the goals and needs of their clients, not merely "beating the market."

The **Best Advisors** have open and patient interactions with their clients, resulting in both the client and advisor having a clearer understanding of the issues and challenges faced. Clients leave advisor meetings with increased clarity and confidence.

The **Best Advisors** provide service at a fair value—fees reflect the level of service and performance, not solely the amount of managed assets.

The **Best Advisors** are proactive, not reactive. They anticipate and address needs and concerns to save their clients time and money, and reduce stress.

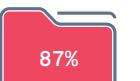
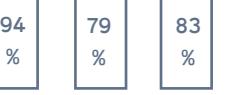
Evaluating Your Current Advisor

Do you have doubts about your advisor?

Perhaps you are happy with your advisor, but would benefit from an outside expert providing objective feedback to validate what seems right and identify areas for improvement.

Using our Client-Advisor Assessment Report, Moenio rates your advisor on 15+ areas of their practice with a focus on how the results relate to your needs and goals.

Score



Deliver to the client our proprietary, four-step report covering 15+ areas of an advisor's practice with actionable recommendations.



Evaluate Your Advisor

Do you

Perhaps you're outside of your right and

Using our to your advisor how the

Evaluation

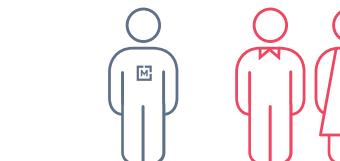
Evaluation

Evaluation

Meet with Client

Why do you want to evaluate your financial advisor?

- Performance
- Poor Communication
- Validation
- Trust
- Fees



Moenio Gathers Info

Advisor



Firm

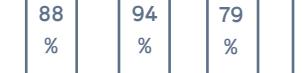


Client



Client-Advisor Assessment Report

Score



87%



Deliver to the client our proprietary, four-step report covering 15+ areas of an advisor's practice with actionable recommendations.





How do you evaluate your Advisor?

How does Moenio evaluate an Advisor's investment methods & performance?

Investment performance is central to a comprehensive evaluation of an Advisor's services, and a key component of our Client-Advisor Assessment Report. We begin this investment analysis with four key questions:

- 1 . Has portfolio performance met or exceeded the goals and benchmarks over one-year, three-year and five-year periods?
- 2 . Were appropriate benchmarks established and communicated?
- 3 . Did the advisor adhere to a disciplined investment methodology?
- 4 . Has performance been consistent across market conditions?

This core investment analysis guides Moenio to investigate further where needed, to better understand the causes and consequences of the Advisor's investment decisions, and provide greater context to results.

Ongoing Monitoring.

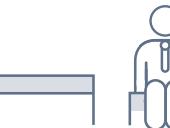
Are you comfortable with your advisor but need help understanding your advisor's decisions and the performance delivered?

Moenio bridges the gap.



Monitor.

monitor and explain my performance. Someone sitting



side of the table during monitoring your performance, as needed to address concerns that have a lasting impact



On Mo



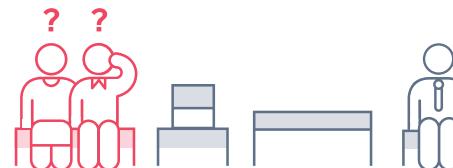
Concerns we often hear:

"I don't understand what my advisor is showing me."

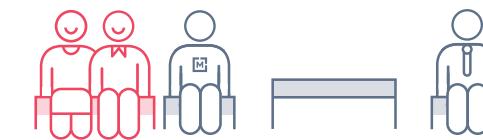
"I thought my returns were better, what happened?"

"I really like my advisor but communication should be better."

"I don't believe my advisor truly understands my needs."



"I need someone who can monitor and explain my advisor's decisions and performance. Someone sitting on my side of the table."



Whether sitting on your side of the table during client-advisor meetings or monitoring your performance, we ask insightful questions needed to address concerns and shed light on the decisions that have a lasting impact on your wealth.



*Who's helping you monitor and protect decisions
being made on your behalf?*

About Moenio.

Moenio was founded with one goal in mind:

Helping individuals, families, and organizations work with their advisors and advisory firms to better navigate the complexities of wealth.

We integrate two pillars of strength

Expertise.

Objectivity.

Capitalizing on decades of experiences in the financial services industry, Moenio brings extensive skills including portfolio management, wealth advisory and banking services for high net worth families, fee-based financial planning, and consultancy in business development, product placement, and insurance.

Utilizing our experience and training to help our clients navigate their wealth when working with advisors and advisory firms.

Moenio's business model and independence means your interests come first:

We are unaffiliated with any financial firm.

We do not manage assets or investments.

We do accept fees or commissions from advisors or advisory firms.

Your interest is our sole interest.

A wide-angle photograph of a lush, green landscape. In the foreground, a dirt path leads up a grassy hill, bordered by a simple wooden railing. The path continues into the distance, winding through the terrain. Below the hill, there are several small, dark blue lakes nestled in the valleys. The background features a range of mountains with dense green forests. The sky is blue with scattered white clouds.

Moenio
Helping our clients
find the right path.

Moenio -

Helping our clients
find the right solutions.

We do not manage assets.
We are not financial advisors.