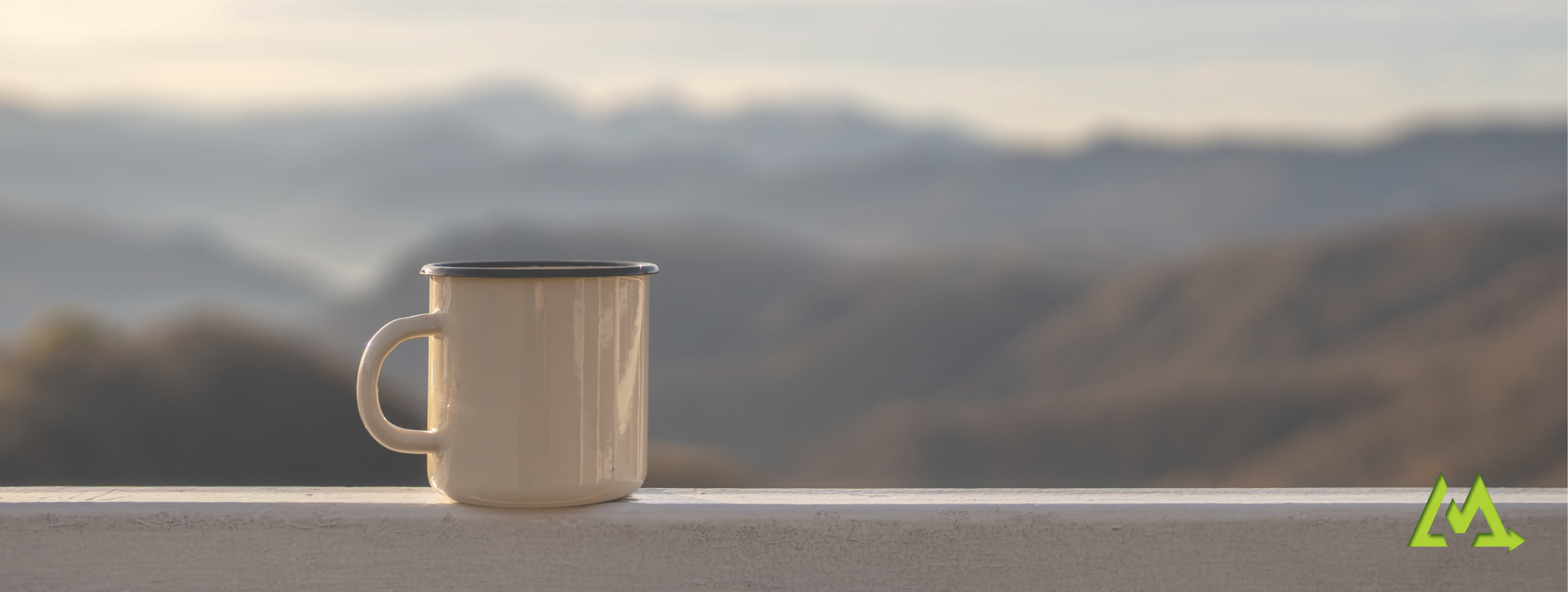
LIFE MOVES
WEALTH MANAGEMENT

Building Wealth Aligned with Your Life Goals

Turn success into freedom, clarity, and purpose. Your financial independence shouldn’t depend on guesswork.

Integrated financial planning and exit strategy for business owners and professionals.

Schedule a conversation today: www.lifemoveswealth.com



A Note from Dale L. Shafer II

Most financial advice focuses primarily on your investment accounts.

But for many people, especially business owners, your biggest opportunities and risks live outside your investment portfolio.

I founded Life Moves Wealth Management to bridge that gap.

We help you make smarter decisions across your entire financial life—your business, your investments, your taxes, and your future—so everything works together with purpose.

Because real financial success isn't just about periodic returns. It's about building a life you actually want to live, with clarity and confidence along the way.

I look forward to the opportunity to serve you, your business, and your family.

Dale L. Shafer II, CFP®, CBEC®, APMA®
Founder | Financial Advisor | CCO

What Makes Us Different

Most advisors only manage your money. We help you manage your financial life.

We integrate:

- **Personal and business finances.** Advisors rarely do this deep level of work, let alone know *how* to do this effectively. We're built for business.
- **Strategy and execution.** Financial planning is a verb. We develop the right game plan and define the best action steps, knowing the plan may change as your life moves.
- **Today's decisions and tomorrow's outcomes.** We work to understand how you think and see the world so that the advice delivery aligns with your core beliefs. This helps us execute on the right things and identifies how to help you avoid reactionary decisions.

Our focus: Turning complexity into a clear, actionable plan.

Our goal: Help you build wealth that is intentional, transferable, and aligned with your life's purpose

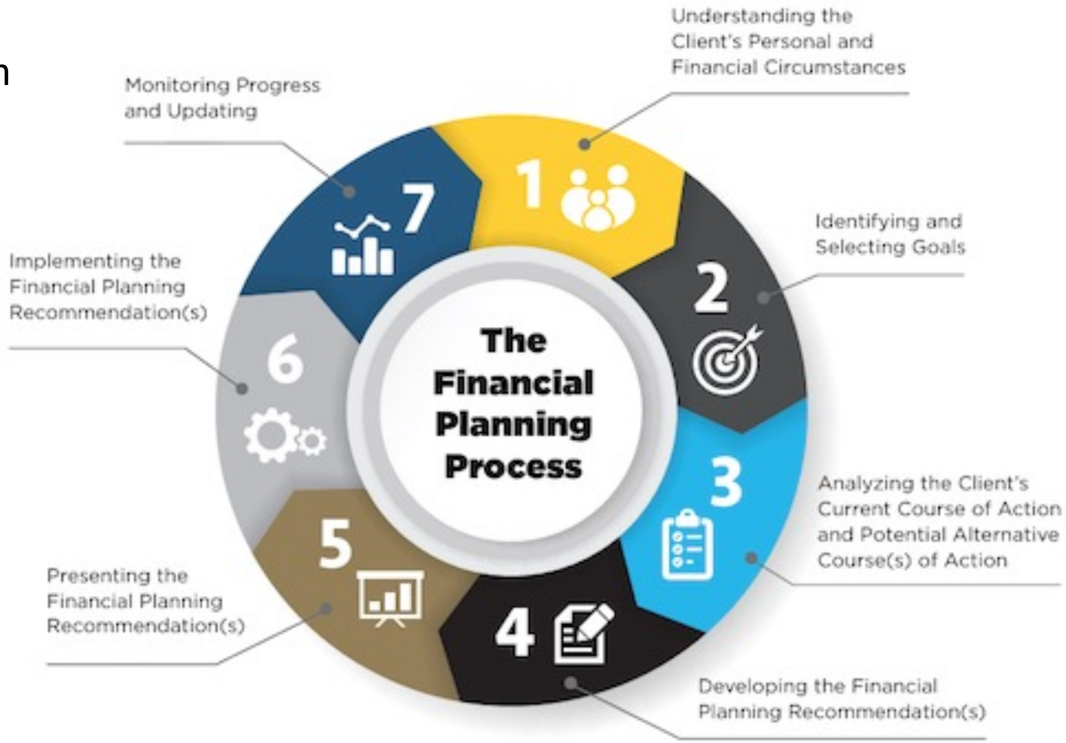
In our first few meetings, we'll write your **statement of financial purpose** to help guide your future financial decisions. It's essentially a mission statement for your money, helping define what matters most about how you use your resources.

Our Services

Comprehensive Financial Planning

Asset & Liability Planning
Structure your balance sheet to support growth, flexibility, and long-term stability. We help ensure your assets are working efficiently and owned correctly, while liabilities are used strategically, not reactively.

Cash Flow Planning
Align income, spending, and savings with your priorities, without over-sacrificing lifestyle. Clear cash flow visibility allows you to make confident money decisions today while still planning for tomorrow.



Risk Management
Protect what you've built with thoughtful insurance and liability strategies. We don't see insurance as financial products for you to buy. The goal is getting the *right* coverage in the right places.

Investment Management
Disciplined, goal-aligned portfolios integrated into your broader financial plan. Every investment decision is made within the context of your overall strategy, not in a vacuum. Our investing is a methodical process for long-term success, not whimsically chasing short-term returns.

Advanced Planning Strategies

Tax Planning
Proactive strategies to reduce lifetime tax liability throughout the year, not just at the annual filing time. We focus on forward-looking decisions across your entire financial plan—income, spending, investing, and your estate—that create meaningful long-term savings.

Charitable Planning
If you're charitably inclined, let's maximize impact and efficiency in your giving. We align your generosity with smart tax and investing strategies, all in the context of your long-term financial and legacy goals.

Retirement Planning
Build sustainable income streams designed for flexibility and confidence. Retirement isn't a number… it's a transition that needs to be planned intentionally. We help you retire to a new purpose, so you aren't just a person who "used-to" do important things.

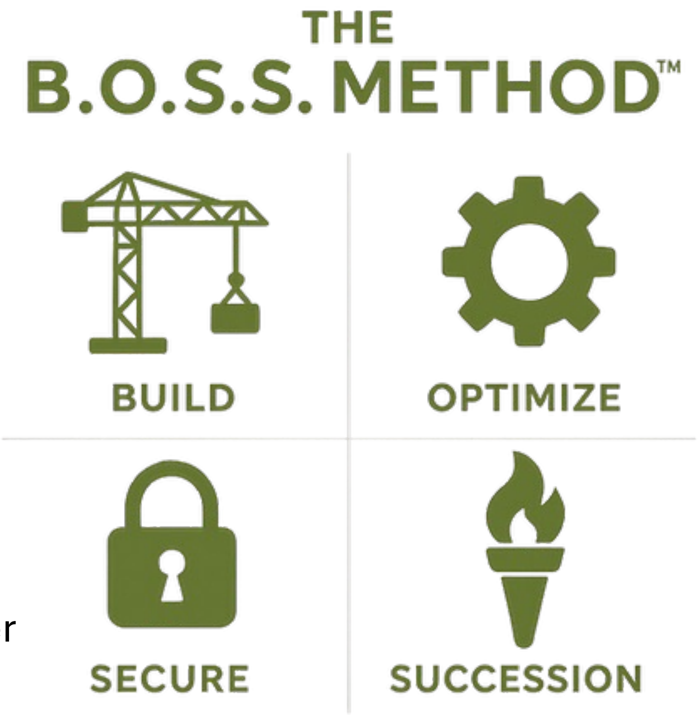
Estate Planning
This is possibly the most essential part of a solid financial plan. Ensure your assets transfer efficiently and according to your wishes. We help coordinate your plan, so nothing is left unclear or exposed.

For Business Owners

Business Financial & Exit Planning
Your business is likely your largest asset, and yet it's often the least planned. The best exits aren't rushed… they're built over time with intention and strategy.

With our B.O.S.S. Method™ financial framework, we help you:

- Understand a realistic range of what your business could be worth
- **Build** transferable value
- **Optimize** and reduce owner dependency
- **Secure** what you've built and begin to diversify your personal wealth beyond the business
- **Succession** planning to prepare for a successful transition or exit



Company Sponsored Retirement Plans
Design and optimize retirement plans that benefit both the business and its people. Establishing this benefit for yourself and your people increases financial literacy and better financial stewardship in the workplace.

We help you:

- Select the right plan structure (401(k), Profit Sharing, Cash Balance)
- Maximize contribution and tax efficiency for owners
- Create meaningful benefits that attract and retain talent

How We Measure Results

Beyond Just Investment Returns

We measure success through real-life outcomes:

- **Clarity:** You understand where you are and where you’re going
- **Confidence:** You can make decisions without second-guessing
- **Efficiency:** Your tax, investment, and business strategies work together
- **Flexibility:** You have options—today and in the future
- **Freedom:** Your financial life supports how you want to live
- **Results:** Full visibility into the investment and financial plan, and performance over time

Because the true return on planning is making smart and value-based decisions about how you choose to use your time, talent, and resources.

Our Fees

Transparent. Aligned. No Conflicts.

We are a fee-only fiduciary firm.

That means:
- No commissions
- No product sales
- No hidden incentives

Our structure is simple:
- Flat planning fees
- Investment management fees where applicable

Our advice is designed to serve your best interests—always. This transparency allows you to focus on outcomes, not question motivations.

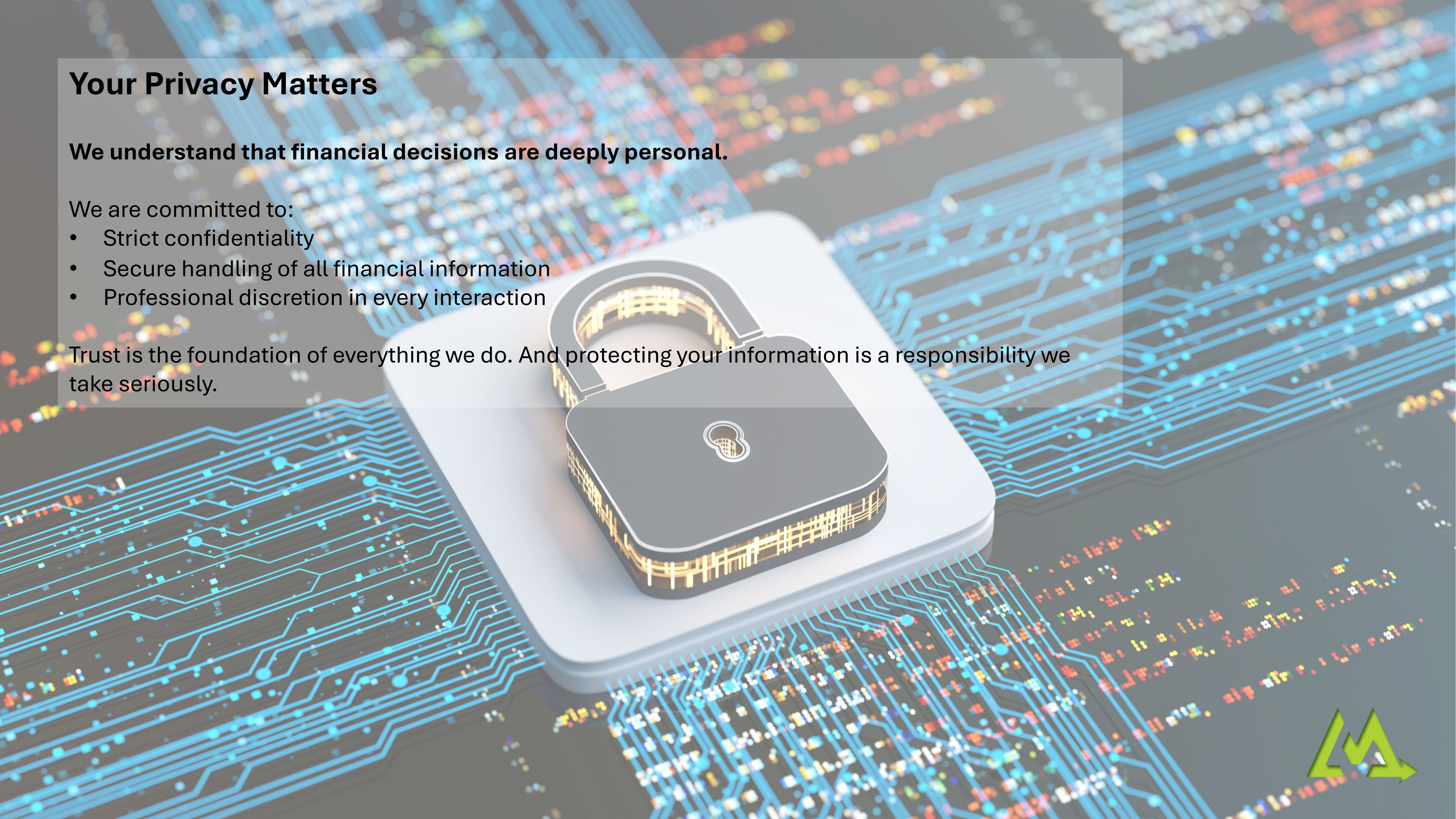
Your Privacy Matters

We understand that financial decisions are deeply personal.

We are committed to:

- Strict confidentiality
- Secure handling of all financial information
- Professional discretion in every interaction

Trust is the foundation of everything we do. And protecting your information is a responsibility we take seriously.



Let’s Build Your Financial Strategy

Whether you’re growing your wealth, optimizing your business, or planning your exit, we’re here to help you think bigger and and make smarter financial choices.

A clear plan today can create significantly better outcomes tomorrow.

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