

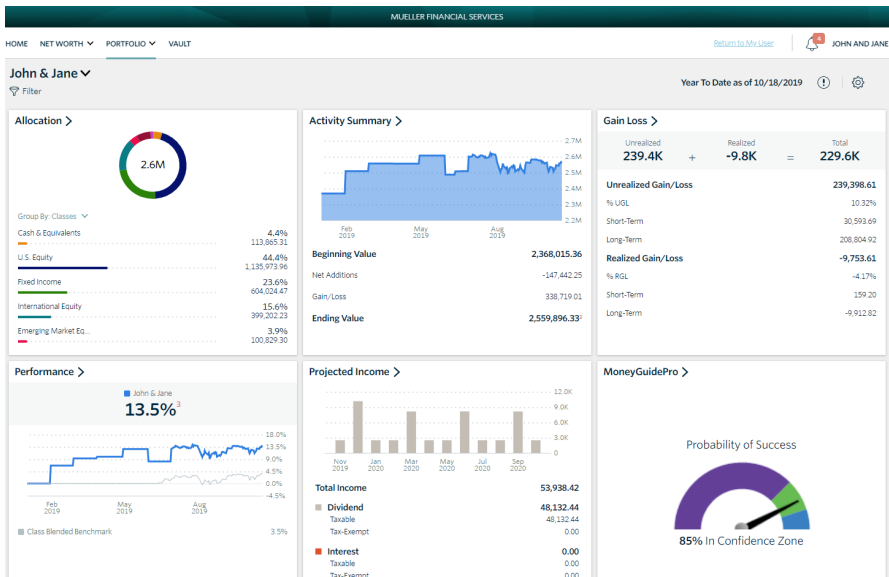
ANNOUNCING AN EXCITING NEW TOOL FOR OUR TAX CLIENTS



Mueller is pleased to present a new wealth reporting platform, powered by industry leading **Black Diamond** to our current tax clients at no charge or obligation. This intuitive and comprehensive platform will:

- Aggregate all your investment, savings, and retirement account information in one location for a holistic picture of your net worth
- Allow distinctive views of income, account activity, daily performance, and more
- Securely share documents with your financial team and store important documents through the online *Vault* feature
- Instantly integrate with our state of the art financial planning software, MoneyGuidePro® (see back page for more details)

The ability to consolidate your financial data into one easy to use, single sign on platform not only allows you to see your "whole financial picture" but it also empowers us to be in a better position to advise you on life's important decisions.



Securities offered through LPL Financial. Member FINRA / SIPC. Investment advice offered through IHT Wealth Management, a registered investment advisor. IHT Wealth Management and Mueller Financial Services, Inc. are separate entities from LPL Financial.

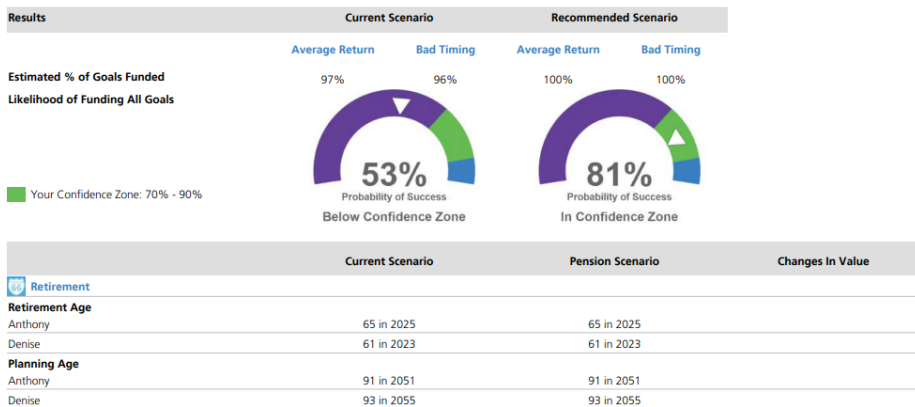
A TRANSFORMATIVE DIGITAL APPROACH TO FINANCIAL PLANNING



MoneyGuidePro® is a revolutionary platform which allows you to view your financial future and help tackle the 'what if's' in life. The client experience includes:

- Identifying and inventorying your current financial situation with our **Present Condition Analysis (PCA)**
- Defining your financial goals and the funding needed to make them a reality
- Customization of a retirement plan that includes both accumulation and income distribution strategies, social security planning tips, and more
- Guidance in becoming more knowledgeable, confident, and in control of your financial future
- Step by step action items to bring your financial plan into the "confidence zone"

A SAMPLE VIEW



Learn more about this complimentary platform by contacting:

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Or, send this back in your tax organizer packet with the following information, and we will reach out to you:

Name _____ Email _____ Phone _____