Nehrbas Wealth Management

Your Partners in Wealth at Janney Montgomery Scott LLC

Overview of Personalized Services Provided

Consultative Services

- Partner with you to analyze and determine your specific financial goals and priorities.
- Customize and maintain your comprehensive Financial Plan utilizing investments best suited to your individual needs.
- Conduct complete Portfolio Reviews (at least Quarterly) to ensure financial plans are kept up to date and in line with your changing life events and needs.
- Work directly with your outside professional team including CPA, Attorney, estate planner, insurance specialists and other members of your professional team to ensure all aspects of your financial planning is taken into consideration.
- Provide continuous access to our network of financial professionals and resources for you, your family and friends.
- Provide exclusive access to our proprietary economic, equity, and fixed income research.
- Adhere to investment plans through periods of volatility to help client's "stay the course".
- Employ powerful projection tools to best evaluate your current portfolio vs long-term cash flow needs.

Investment Management

- Design and implement a customized asset allocation plan based on your goals and risk tolerance.
- Select specific investment managers and strategies that best fit your needs.
- Provide ongoing portfolio monitoring and rebalancing.
- Develop long-term risk management strategies for investment portfolio.
- Design and execute account transfer and consolidation plans and perform complete reconciliation reports upon settlement.
- Complete year-end gain and loss analysis for tax consideration.

Administrative Services

- Act as your fiduciary, where your interests legally come first.
- Execute trades and other transactions for your account.
- Supply tax reporting both to you and the IRS.
- Charitable giving.
- Provide monthly or quarterly account statements to you and interested parties based on your needs.
- Produce detailed performance reports to help you analyze your progress.
- Maintain online services and eDelivery functions for convenient access to your account information.
- Complete ongoing processing and maintenance of your account records.
- Rapid response to all questions or concerns, with resolution within 24 hours.

Andrew R. Nehrbas
Executive Vice President

David S. Penn, CFA®
Senior Vice President

Meg Tegler Hardesty, AWMA®
Account Executive

Steven M. Lane, AWMA®
Account Executive

Clare P. Cox
Registered Private Client Associate

Scott Nehrbas
Private Client Associate

NEHRBAS WEALTH MANAGEMENT
AT JANNEY MONTGOMERY SCOTT LLC
40 Morris Avenue, Suite 200, Bryn Mawr, PA 19010
610.526.7200 | 866.909.4824 | www.NehrbasGroup.com

Janney
Trusted Advisors for Generations