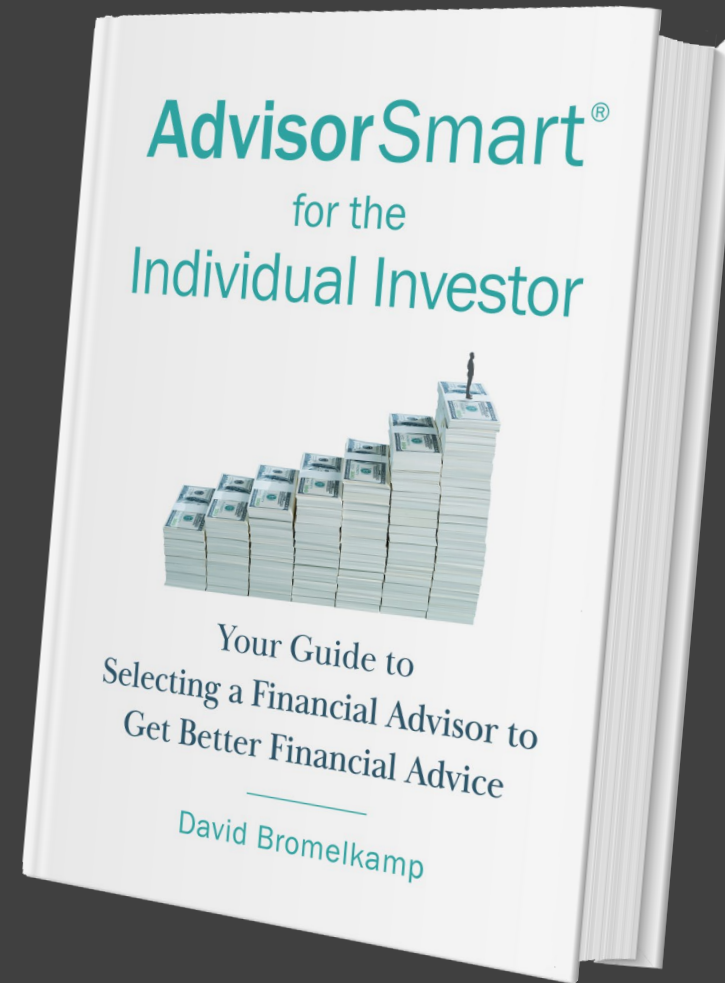


AdvisorSmart[®] for the Individual Investor



Allodium Speaker



David Bromelkamp, AIF®

Founder & CEO, Allodium

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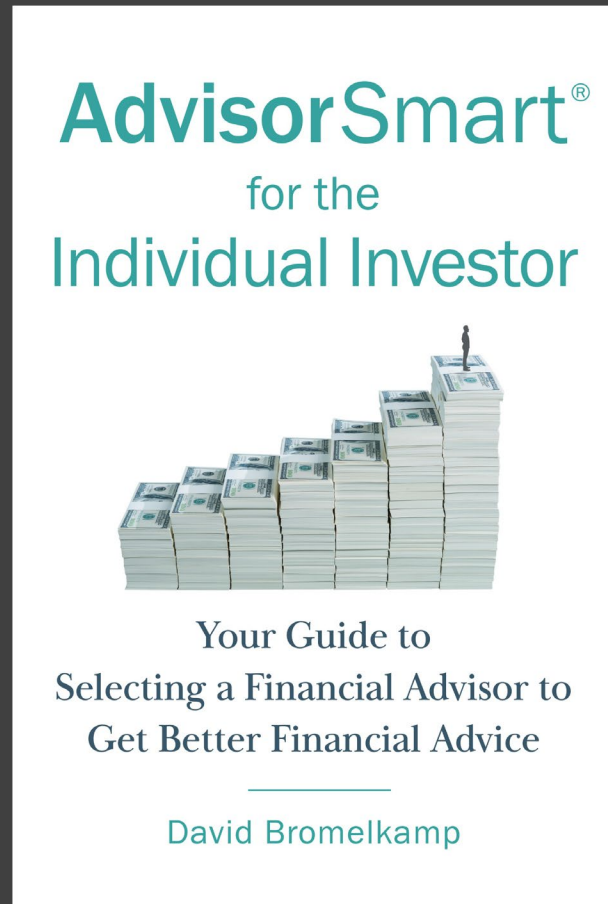
Agenda

1. Why Did I Start AdvisorSmart as a New Company?
2. Summary of the AdvisorSmart for the Individual Investor Book
3. The Author's Journey
4. Current Book Update & Future Projects
5. Questions & Answers

Advisor Smart

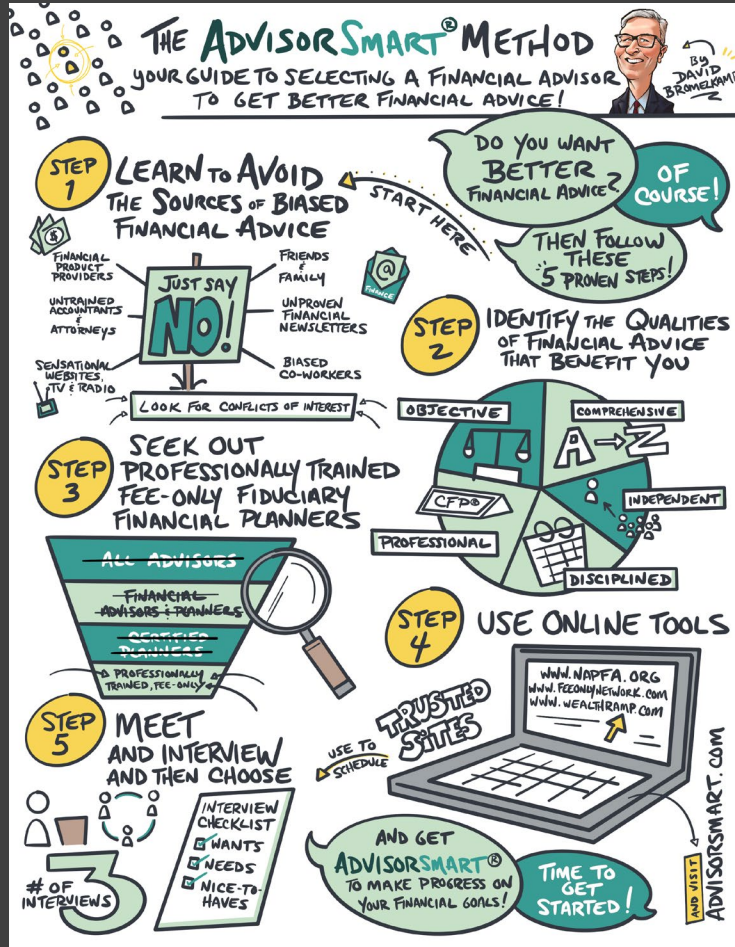
- New company established in 2018
- Goal to help investors
- Idea to write a book

The AdvisorSmart for the Individual Investor Book



- The Finished Product

The AdvisorSmart for the Individual Investor Book



- Sketchnote Summary
- Five Step Process
- The AdvisorSmart Method

The AdvisorSmart for the Individual Investor Book



Learn to Avoid Biased Advice:

1. Avoid the Sources of Biased Financial Advice
2. Avoid Conflicts of Interest
3. Use a Process of Elimination

The AdvisorSmart for the Individual Investor Book



Qualities of Good Advice:

1. Independent
2. Objective
3. Comprehensive
4. Professional
5. Disciplined

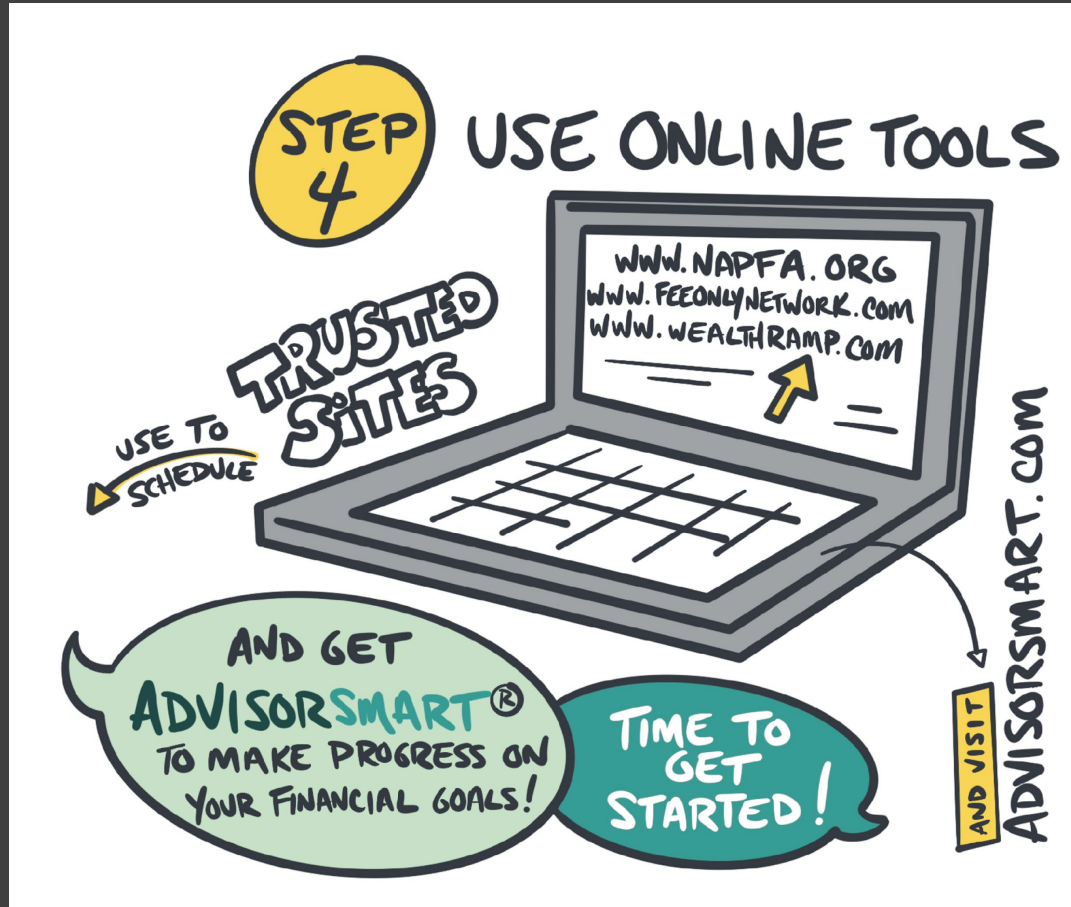
The AdvisorSmart for the Individual Investor Book



Search for:

1. Professionally Trained
2. Certified Financial Planners
3. Fee-Only
4. Legal Fiduciary

The AdvisorSmart for the Individual Investor Book



Online Search Tools:

1. NAPFA.org
2. FeeOnlyNetwork.com
3. Wealthramp.com

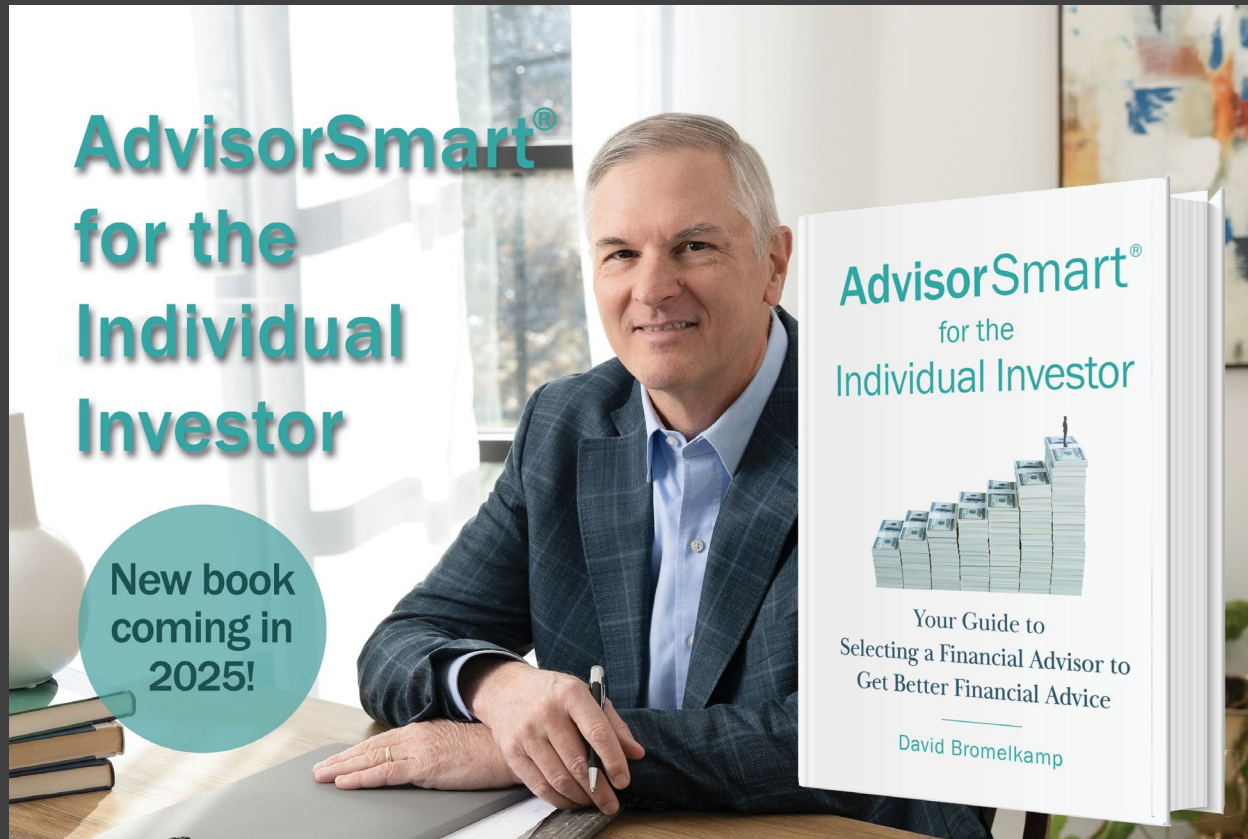
The AdvisorSmart for the Individual Investor Book



Interview Three Advisors:

1. Needs, Wants & Nice to Haves
2. Interview Checklist
3. Interviews

The Author's Journey



1. Writing
2. Publishing
3. Marketing

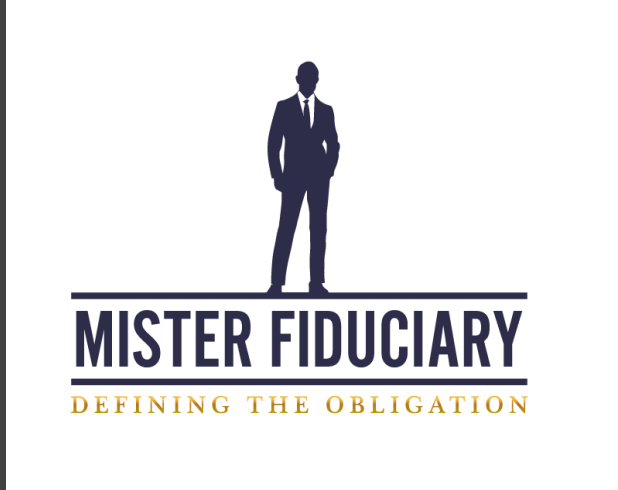
Current Book Update & Future Projects



- eBook
- Hard Cover Book
- Soft Cover Book
- Online Course
- Audiobook
- Public Speaking

Current Book Update & Future Projects

MISTER FIDUCIARY
DEFINING THE OBLIGATION



Another Book?

- Mister Fiduciary Blog
- Fiduciary Standard for the Financial Advisor

Summary

1. Why Did I Start AdvisorSmart as a New Company?
2. Summary of the AdvisorSmart for the Individual Investor Book
3. The Author's Journey
4. Current Book Update & Future Projects
5. Questions & Answers

Q & A



Q & A

Thank You



Thank You!