Welcome to Williamson Wealth Management! We are excited to begin this journey with you. Thank you for placing your trust and confidence in our team as we help you to design a personalized financial plan.

Your Financial Advisors:

Harry Williamson, WMS

First Vice President, Investments

Financial Advisor

Sam Williamson

Financial Advisor

As your financial advisor, I can guide you through:

- Financial planning to help you achieve your lifestyle objectives
- Retirement planning and solutions (including accumulation, retirement income, Social Security, and healthcare) Investment and asset management services
- Fee based and managed money services
- Estate planning and trust services
- College/Education planning
- Life, long-term care, and disability insurance analysis and review
- Tax planning and coordination with your tax professional
- Bank services including checking, saving, CD’s, and lending

Your service associates:

Jen Van Horn, Client Service Associate

Leigha Austin, Client Service Associate

Please contact Jen or Leigha for:

- Scheduling appointments
- Account balances, positions and values
- Deposits, withdrawals, wire, and transfers from your account
- Questions about your statement or other paperwork

- Updating your information (name or address change, etc.)
- Tax Documents (1099 forms, year-end statements, etc.)
- Check re-order, check copies, lost checks or VISA card
- Setting up Internet access to your account

Client Access via the Web: www.williamsonwealthmgt.com

Use Client Access to:

- View your Raymond James account activity and investment allocations
- View your statements
- Get quotes, news, research, and economic outlook
- Check future dividends and interest due

The enclosed welcome packet will help familiarize your with our firm, Williamson Wealth Management, and your accounts.

You will find:

- The Client Service Platform
- Instructions for enrollment to Client Online Access
- A guide to your Comprehensive Overview Statement

We are dedicated to our clients and committed to delivering exceptional client service while providing comprehensive wealth management. We look forward to working with you to help you meet your financial goals.

Williamson Wealth Management
RAYMOND JAMES®

7887 Washington Village Dr; Suite 100

Centerville, OH 45459

harry.williamson@raymondjames.com

Website: www.williamsonwealthmgt.com

Phone: 937-431-6700

Toll Free: 866-754-3659

Fax: 937-431-6730

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