56 GROUP SUPPORT

As an independent firm we work closely with many of the world's most trusted financial institutions in offering best service we can to our clients. In particular, we work closely with the below firms on an ongoing basis in the following capacities:

MONEYGUIDE PRO / PIE TECHNOLOGIES

PIEtech is dedicated to one thing - helping advisors use financial planning to more effectively motivate each client to create, implement and maintain an investment strategy that best meets their lifetime financial goals. MoneyGuid ePro is the first collaborative internet-based financial planning software that makes this easy to accomplish. Its unique client-centered approach supports a sophisticated, goal-oriented planning process that is more meaningful to the client and more productive for the advisor.

SCOTTRADE

If not the best, Scottrade is one of the top all around discount brokerage firms in the country. Recently voted one of the Top 100 Companies to Work For In 2008(Fortune Magazine), three years ago Scottrade introduced Scottrade Advisor Services. This services is dedicated to independent advisers assisting us in servicing individual accounts such as regular taxable accounts, IRA's, and trust accounts. With Scottrade we have a proven and highly regarded firm we can put 100% trust in to custody our client assets. This past year, Scottrade once again received J.D. Power & Associates award for "Highest In Investor Satisfaction With Online Investor Services."

MORNINGSTAR

Morningstar, best known for their mutual fund research reports that have become standard throughout the financial industry, has grown into a research and financial tools behemoth. They are a fundamentally driven company, much like ours, and therefore when we can leverage their scale to complete our tasks, we use their services. These services currently include stock, bond, and mutual fund research as well as everyday market data. In the near future we will be subscribing to their Advisor Workstation. This is a robust database that pulls together all of Morningstar's tools the public is familiar with and adds a complete software package to assist our reporting, accounting, and communications with our clients. Morningstar has focused tremendous resources to the investment adviser and obviously we are happy about this.

ADVISORETF401K

The AdvisorETF401k is provided by Plan Administrators Incorporated ("PAi"). In addition to their low cost administration the key to this 401(k) is the inclusion of IShares ETFs. To date, there are only a handful of plan administrators who offer ETFs in 401(k) plans. Of these administrators the

AdvisorETF410k is perfectly suited for the small and mid-sized businesses. PAi has been servicing this market for over 20 years and most recently ranked in the top 5 of plan administrators to the micro and small business plans (under $10 million in assets). Working with them alleviates us any concern with the administration of the plan allowing us to focus on ensuring the investment side of the plan is as good as it can be.

THEONLINE401K

The Online 401(k), a Web-based retirement company that provides small and growing businesses with affordable quality retirement plans. As with the AdvisorETF401k we work with TheOnline401k to provide our clients with a second to none 401(k) plan. When clients require a greater investment selection or more premium features we typically work with TheOnline401k to make this happen. Through the use of technology, this 401(k) is as good as plans offered to multibillion companies.

the online 401(k)
FWD Forward Thinking

Along with these main partners, we develop new relationships when it makes sense. We also share in information made available to us online via subscription such as the Wall Street Journal. The above firms have vast resources that we continue to leverage so we can meet our #1 goal – ***Add Value For Our Clients!***

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