



Diversified Asset Management, Inc. Second Opinion Service

Exclusively for friends, family and associates of our valued clients



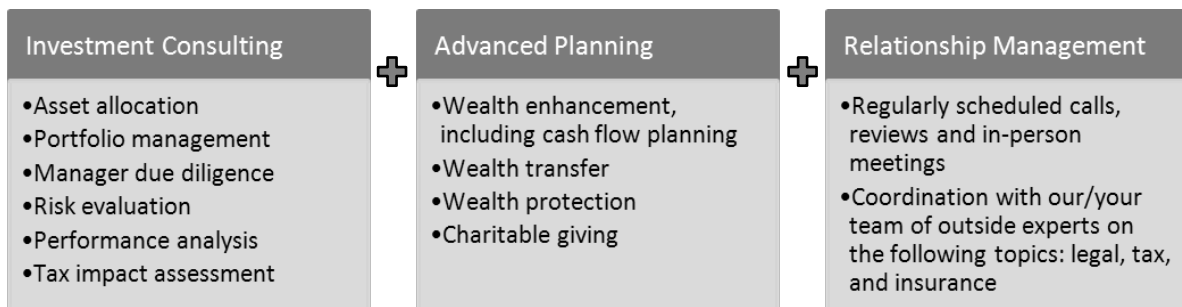
In this challenging economy, you probably know a friend, family member or colleague who may have a complex financial situation or is simply unsatisfied with the services of his or her financial advisor—it's not uncommon. We believe that many high-net-worth investors would value a second opinion on their finances.

In order to help the people you care about achieve their financial goals, we have created our complimentary Second Opinion Service. We're pleased to offer your friends, family and associates the same expertise and guidance that you've come to expect as a valued client of Diversified Asset Management, Inc.

Working with a team that redefines wealth management

Ask ten investors to define wealth management. Actually, ask ten "wealth managers" to do so. You'll almost definitely get ten different answers, and most are likely to be heavily focused on investing. As a client of Diversified Asset Management, Inc., however, you benefit from a cutting-edge team that has a clear and comprehensive vision of wealth management.

Wealth Management



Our consultative process

We approach each new engagement with a time-tested, collaborative process. This allows us to have an open dialogue in which we learn about your values and goals while working with you to tailor a plan to help meet them. As a valued client, you'll recognize each of the five steps below and can offer a portion of our services, complimentary, to your friends, family and associates.

Full client experience



What to expect from the Second Opinion Service

We will meet with your friends, family members and associates for a Discovery Meeting. Assuming that we both agree that we have a basis for working together, they will return for the Investment Plan Meeting. Hopefully, we can confirm they are on track to fulfill their values and achieve their goals with their current financial provider. If needed, we will suggest ways in which we can help, including recommending another provider if we are not the best fit for their needs. Either way, they will receive a Total Client Profile and a personalized analysis of their current situation.

Second Opinion Service



Let us help you help those you care about. Contact us today.

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Important information about Advisory Services

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