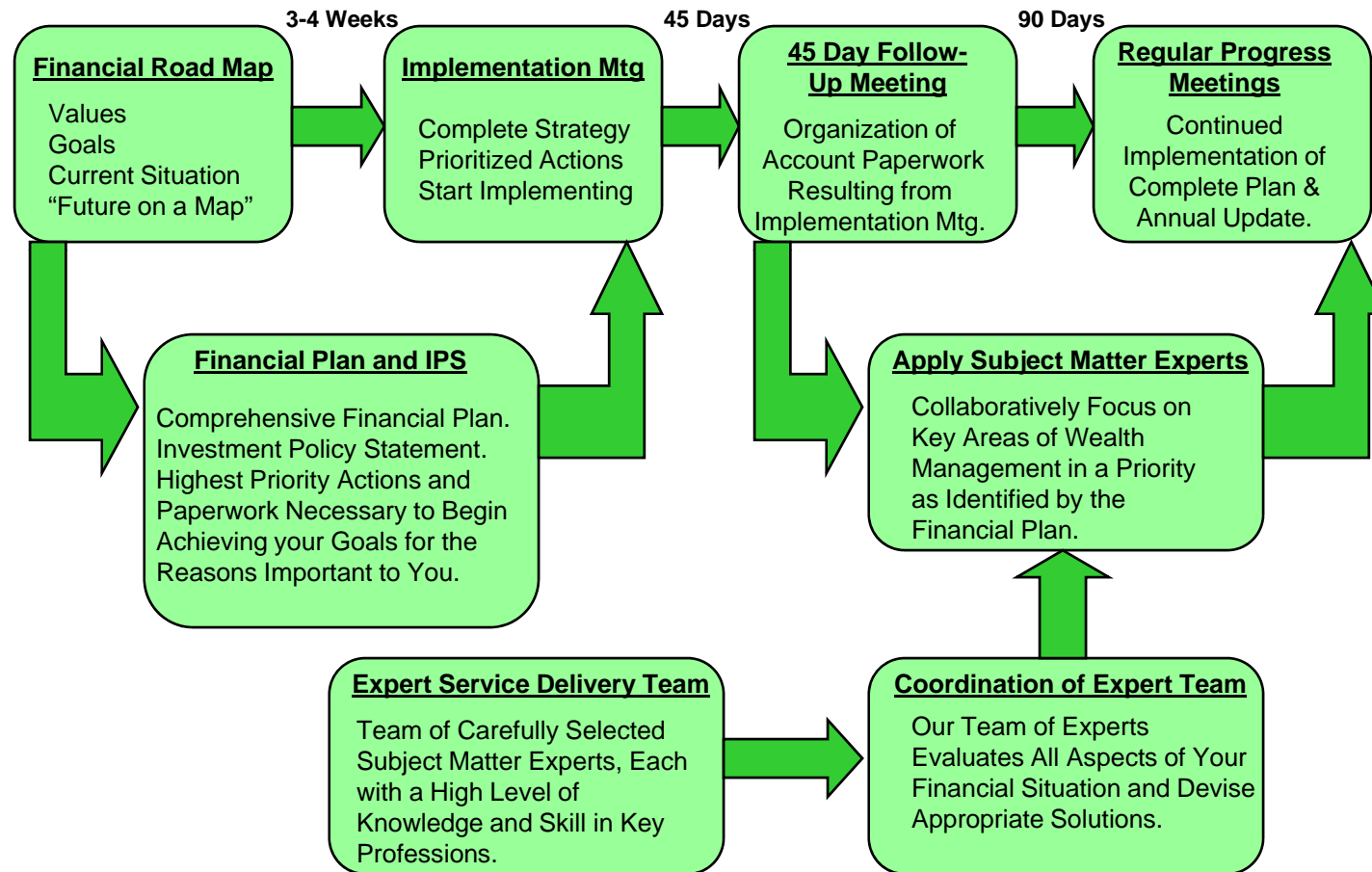


O'Reilly Wealth Advisors Wealth Management Consulting Process





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Wealth Management Formula*

$$WM = IC + AP + RM$$

$$AP = WE + WT + WP + CP$$

$$RM = CRM + ERM$$

IC (**I**nvestment **C**onsulting) = Asset Allocation

AP (**A**dvanced **P**lanning) = **W**ealth **E**nhancement (Income Tax)
Wealth **T**ransfer (Estate Planning)
Wealth **P**rotection (Mitigate the risk)
Charitable **P**lanning

RM (**R**elationship **M**anagement) = **C**lient **R**elationship **M**anagement
(Managing the relationship)
Expert **R**elationship **M**anagement
(Managing a team of experts)

* Statistics have shown that 78% of financial professionals today call themselves wealth managers but only 8% actually put it into practice.