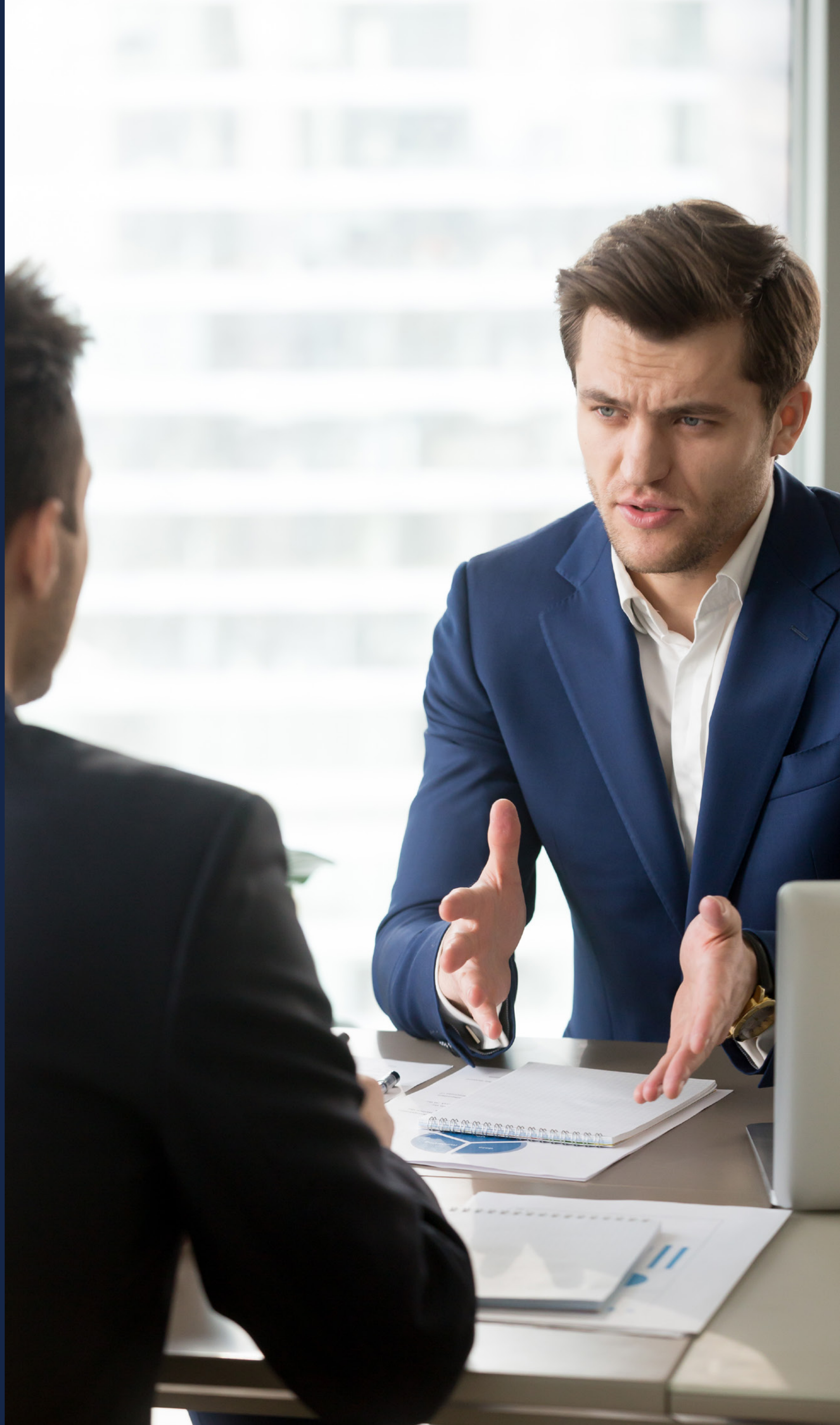
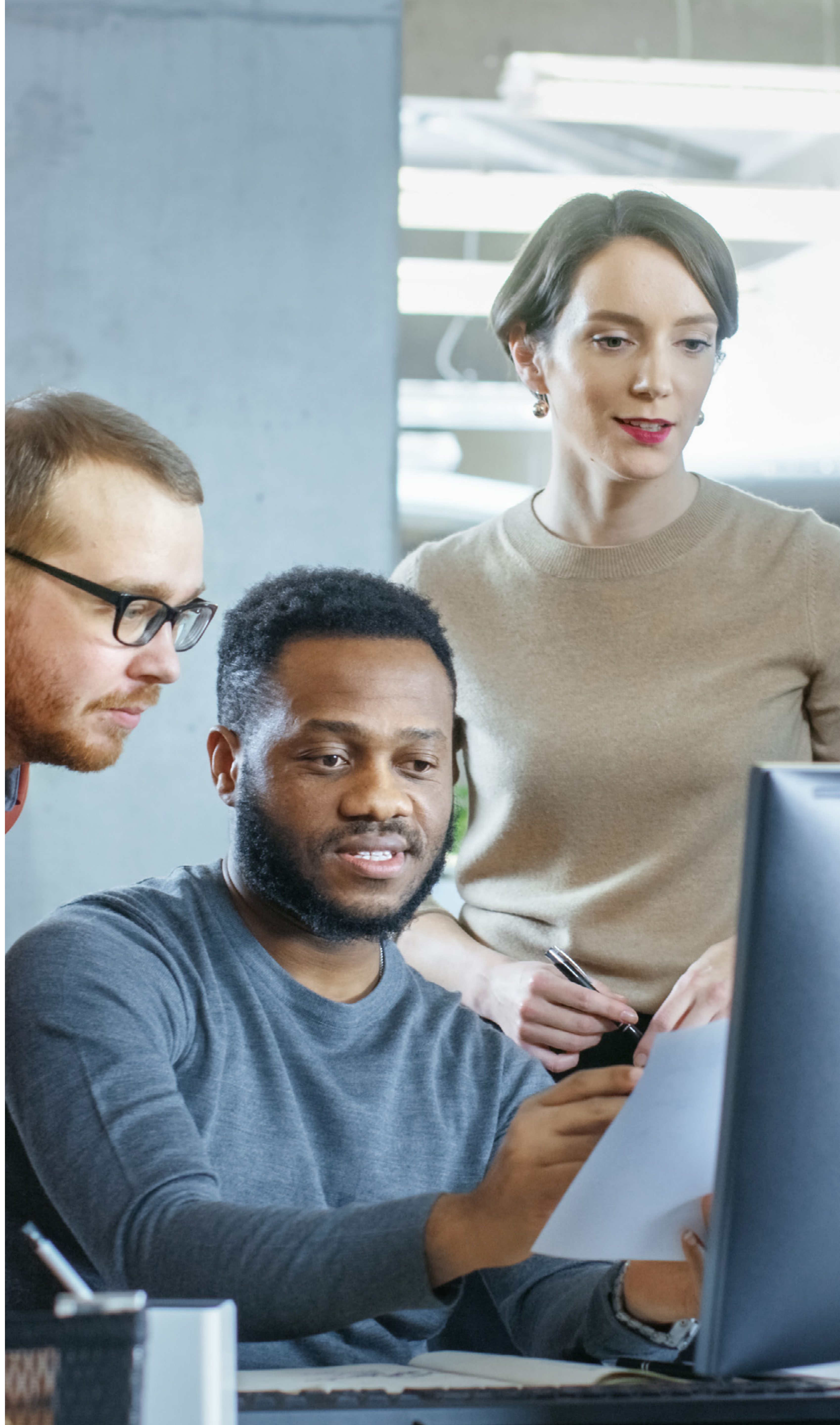
FinDec



Grow with FinDec

About Us

In 1987, we earned the trust of our first client. It was that trust that built the foundation we stand on today. More than thirty years have passed, but our commitment to our clients' success has not waivered. In an industry obsessed with numbers, we don't forget that people are at the heart of what we do. Our clients are at the core of every decision that we make, so we've assembled a team of experts that value relationships just as much as results. Our diverse team is made up of experienced industry veterans and innovative up-and-comers. Behind everything we do, there is a real person with real dreams. Everything we do is done for the betterment of human lives and legacies, both inside and outside our walls.



FinDec

Message from the President/CEO

FinDec has been faithfully serving our clients' needs since 1987. We have worked prudently to build an organization guided by our core values that have been the backbone of this company since inception.

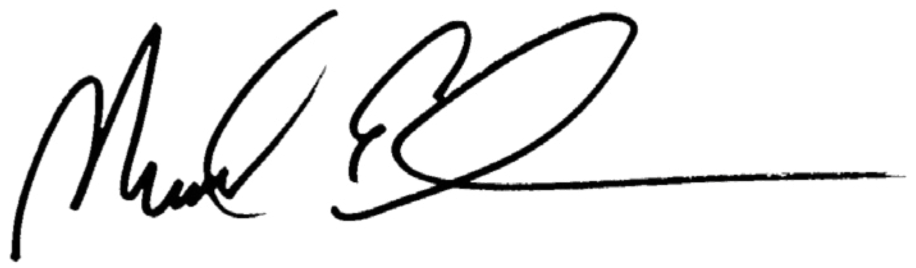
Our team of financial professionals bring a depth of knowledge base and credentials that few firms can offer. We are proud of the team we have created that supports our clients' dreams, offers a comprehensive approach to financial planning, and seeks to understand short-term and long-term goals of those we serve. We are committed to adding value to our clients' portfolio and future.

We serve clients Nationwide and take great pride in our personal approach to business. Taking a hands-on approach with our clients; socially distanced in person or virtually, has been a crucial part of our operations since my Father founded the company. It is my goal to continue moving forward with the suite of services and options for our clients to have face-to-face meetings whenever they desire.

Our clients vary from individuals seeking financial planning to large corporations desperately needing plans restructured to varied size companies who simply want their retirement plans managed seamlessly. Bottom line, we are creating financial freedom through multi-generational financial and retirement planning for our clients. We want to serve our clients the way we would want to be served.

We are a team who values loyalty. We are in business to bring an extraordinary experience and do not take our clients' trust for granted. From all of us at FinDec, we look forward to growing together.

Sincerely,



Michael E. Lee

FinDec

Our Mission

“

We create financial freedom through multi-generational financial and retirement planning.

FinDec

Our Values

Family

1

Everything started with a dad, mom and two sons. Even as the company grows it stills holds onto the family values and traditions.

Integrity

2

We will never direct you to do something that we know is wrong and will always steer you in the right direction.

New Ideas

3

Everything will and must change, so we always are looking for new ideas on how to better service our clients.

Determination

4

We are never satisfied with just the status-quo, we will always make sure we are doing the best by our clients.

Excellent Service

5

In a growing world of technology we still want to provide the best service to our client and deliver that service in person.

Client First

6

We are not driven by the material successes but by the success of our clients to ensure they have a secure financial future.

FinDec

What We Do
Advisory

Comprehensive Wealth Management

Financial Planning
Your retirement plans, estate wishes, and dreams of creating a lasting legacy are different from other investors. So why is your wealth management plan the same as theirs? We take the time to assess your individual goals in order to create a plan that's unique to you.

Investment Management
Our plans are designed to give you the best opportunity to grow your wealth and meet your goals.

Estate Planning
It's a difficult process to start, but we'll do the heavy lifting to find the best plan for leaving your wealth in good hands.

Charitable Giving
There are many nuances to charitable giving that most investors don't even think of. We're here to help you develop a gifting plan.

Workplace Retirement Plans

Investment Management
As your co-fiduciary, we'll handle the nitty-gritty details of your company's investment plans so you can focus on growing your business. We'll also take the time to speak with your employees and offer each of them the specific advice they need to build a portfolio that meets their individual needs.

Employee Educational Services
Educating your employees on their benefits packages and retirement plans is one of the most important jobs we have.

Employer Committee Services
We offer services that range from consultation and fee benchmarking to full-discretionary investment management.

Customer Service
One of the most important aspects of our job is ensuring you and your employees get the most out of your plan.

FOR FAMILIES AND WORKPLACE

What We Do

Insurance

Insurance benefits are one of the best ways to develop employee retention by allowing employees to have access to individual planning and for employers to create incentive packages as well. Insurance offers more opportunities to provide for loved ones, plan for retirement, or build wealth; our advisors can help educate specific to what our clients are looking for in a financial advisor. We are committed to helping you find the absolute best benefits package for your company and its employees, and individually.

Comprehensive Review
Your company's insurance needs are unique. Let us craft a custom package that works best for you and your employees.

Insurance Packages
We offer a range of insurance packages that cover all your needs.

FinDec

What We Do
Recordkeeping

FinDec

We pride ourselves on our ability to stay ahead of evolving technologies. Our integrated and secure website gives plan sponsors, participants, administrators, and other financial advisors easy access to the tools they need to manage their accounts. Through our strategic partnerships, we're able to offer participants access to investment choices, tools and resources, and asset protection that is simply unmatched.

Cloud-based Tools
Our range of secure and integrated cloud-based tools place the resources you need to self-manage your portfolio at your fingertips.

Recordkeeping Services
Our recordkeeping services are wide-ranging and technologically secure.

Customer Service
Our work doesn't end when we find the right plan for you. One of the most important aspects of our job is ensuring you and your employees are getting the most out of their plan.

What We Do
Third Party Administrator

Every company is unique in its makeup, its mission, and its offerings. As your company's third party administrator, we'll design a customized plan that fits your specific needs. Our work doesn't end there. We will work to continuously manage and analyze your benefits in order to keep you up to date on regulatory changes.

Expert Administration
From planning to oversight, we handle all of the complexities of your plan for both you and your employees.

Compliance Services
We're committed to our compliance with all federal regulations, and assure you that we perform regular checks to stay up to date.

Customer Service
Our work doesn't end when we find the right plan for you. One of the most important aspects of our job is ensuring you and your employees are getting the most out of their plan

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