Personal attention. Verifiable results.

DMJ Wealth Advisors, LLC

Our Firm Belief

At DMJ Wealth Advisors, we do not promise portfolios will 'outperform' the market (or even their neighbor's portfolio) in any given period. Our firm belief is that Consistent Outperformance should not be implied nor can it be delivered by any Advisor.

What we DO tell our clients, is that using the principles we practice, they should experience a better Lifetime Return and have a higher degree of confidence and control in regards to meeting their financial goals and dreams.

When the distinction between short-term out-performance VS. Lifetime Return is understood, then our clients realize the value of a Relationship with DMJ Wealth Advisors.

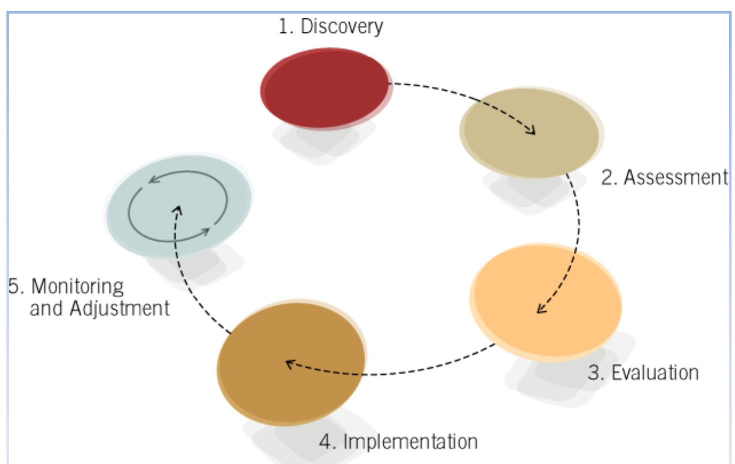
Who We Are

DMJ Wealth Advisors provides financial planning and investment guidance for successful individuals and families who have entrusted us and selected investment partners with the management of over $270 million in assets.

Davenport, Marvin, Joyce & Co., LLP and DMJ Wealth Advisors, LLC are separate entities that work together and share common ownership. Combined we have over 60 employees and just celebrated our 60th anniversary in 2009.

Over the years, we have found that many of our clients face the common challenge of managing their assets to meet multiple and often competing financial objectives such as saving for retirement, funding current Life-Style, debt-reduction/management, and financially helping/supporting family. Before working with us many of our clients engaged a broker to select investments– often without a disciplined process or the ability to align the investments to each individual's specific family cash flow needs.

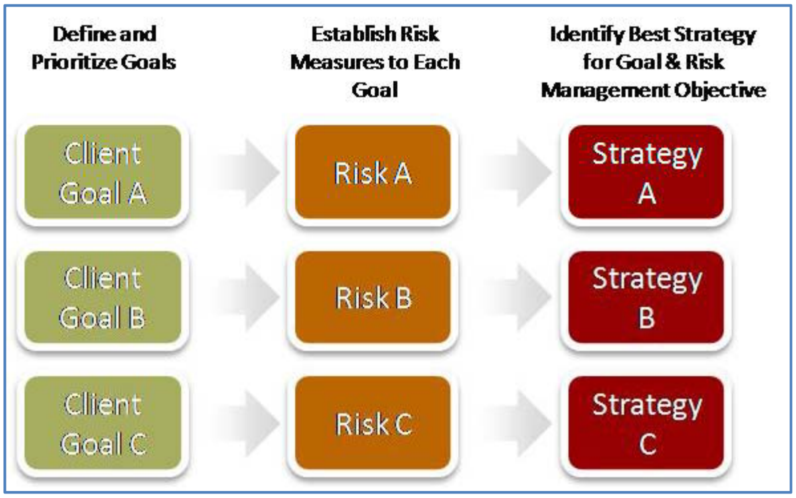
Our Approach to Financial Planning



We develop personalized plans designed to meet multiple financial objectives in the most efficient manner possible. Our Five-Step Process ensures that each clients' Financial Plan is based on their unique life situations and goals. Plans are accessible to our clients through a personal, online portal 24-7 and are updated on a nightly basis.

DMJ Wealth Advisors, LLC

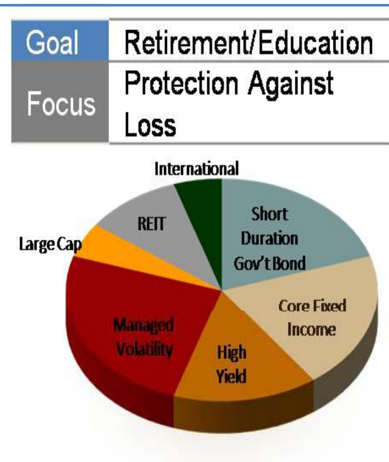
Our Approach to Investment Management



Before working with us, most of our clients managed their assets from a single "bucket" – and made investment decisions based on a Brokerage House's market sentiment.

Our approach, is to establish investment portfolios which directly relate to specified family needs for education, retirement, charitable objectives or other established goals. The allocation and strategy which governs each portfolio is then established based upon risk, return and time-frame for use of the assets.

Strategy A



Strategy B

The GOAL and the FOCUS of each portfolio determines the allocation for each of our clients' customized Investment Portfolios. Above: sample of a portfolio designed for growth vs. a portfolio designed to fund retirement or education needs.

Our Offerings

• Customized **"LIVE"** Financial Plan that is updated daily and personalized for each family. Client's portal access is secure and available to family 24/7, with online vault document storage.

• Disciplined investment portfolios driven by the financial plan.

• Engage institutional managers and portfolios which are designed to address the changing market conditions in relation to the client's stated goals.

• Meetings are scheduled 1-3 times annually to allow for effective communication and ongoing evaluation of the plan.

• Financial plan may also include Estate Planning discussion, insurance review.

Contact us to schedule a complimentary Discovery Meeting to see if our value proposition suits your current needs:

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