

WHY WE MERGED

FIRMS TO FORM LIVEWELL CAPITAL

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With all the turmoil of 2020, this year may seem like an odd time to take a bold step, but we believe it is the right moment to double down on our values and our value proposition.

On July 1, we formed LiveWell Capital. LiveWell will have 17 team members and eight CFP professionals, and will provide financial planning services for over \$600M in client assets. LiveWell was formerly five separate teams at Northwestern Mutual that are now merging into one team to create more synergy, services and expertise for our clients. (We will remain a part of the Northwestern Mutual Wealth Management Company.)

At LiveWell Capital, we believe your financial plan should be about so much more than money. We believe the right financial plan should ask the following questions:

- 1. WHAT'S MY PURPOSE FOR MY LIFE?**
[SPIRITUAL CAPITAL]
- 2. WHAT RELATIONSHIPS ARE IMPORTANT TO ME?**
[RELATIONAL CAPITAL]
- 3. HOW DO I WANT TO SPEND MY TIME TO STAY HEALTHY AND FIND FULFILLMENT?** [PHYSICAL CAPITAL]
- 4. WHAT DO I WANT TO LEARN AND WHERE ARE THE AREAS OF MY LIFE WHERE I CAN GAIN WISDOM?**
[INTELLECTUAL CAPITAL]
- 5. WHAT FINANCIAL GOALS DO I HAVE TO MAKE MY IDEAL LIFE POSSIBLE?** [FINANCIAL CAPITAL]

Ultimately, answering these questions is the start to designing a plan that not only gets a return on your money, but a return on your life. Our experts at LiveWell Capital can be your guide through these questions and can also help you navigate the complexities of investment management, tax efficiency techniques, estate planning and so much more. This team is designed to be multi-functional and multi-generational, which means you and your family have a one-stop shop that can help meet all your financial needs today, tomorrow and beyond.

We want to thank our clients and team for making this possible. If you have a friend or co-worker who is interested in knowing what it means to live well, please have them visit us in our newly remodeled space in the Rookwood Tower, or visit us at Livewellcapital.com. ❖

Stay Safe and God Bless,

Ben Beshear, Co-Founder
David Schimberg, Co-Founder
Andy Scarpitti, Co-Founder
Brad Weeks, Co-Founder
Tim Miller, Principal



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If you want help during this crisis and don't want to implement these strategies on your own or don't have an advisor you love, we'd love to help. You can reach our team at livewellcapital@nm.com or 513.366.3664.