Nicolet

WEALTH MANAGEMENT

INVESTMENT MANAGEMENT SOLUTIONS

COMPREHENSIVE WEALTH MANAGEMENT

Our process is designed to create shared success. Transparent fees. No proprietary fund families. Just an honest conversation about your goals and how we can help you reach them.

Who We Are

Nicolet Wealth Management is a diverse, experienced group of local professionals who focus on creating shared success. We are experts in our respective fields and work collaboratively to create a path for a successful outcome for our clients.

We choose to work for Nicolet because of the strong belief that our purpose is to serve others, and that our presence has made a real difference in the community.

What We Do

We recognize that a singular approach to investing is foolish and that the planning is the hard part. We start every meeting with a blank piece of paper. We work backwards, first deciding on what the end goal is, and then work back toward a plan designed to create success. We understand that there is no shortcut.

No matter what life stage you are in, whether a new investor or are near retirement, we can help.

EVALUATING AND PLANNING → GROWING AND MANAGING → PROTECTING AND TRANSFERRING

Individuals and Families

- Comprehensive Financial Planning *†
- Investment Management *†
- Estate Planning *†
- Corporate Trust Fiduciary Advisory – Serve as Active Trustee †
- Retirement Planning *

Businesses

- Corporate Retirement Plan Services *‡
- Planning & Transfer of Business Assets *
- Insurance Planning & Risk Management *†

How We Do It

We listen. We listen to understand each situation and help formulate a customized plan designed to achieve success. We practice the phrase, "Real People. Real Conversations."

- High quality investment process with a focus on downside risk
- Commitment to fee transparency
- Best in class partnerships for research, systems and tools.
- Nonproprietary wealth offerings
- Proactive, ongoing management and communication

**Advisory Services*

†Trust and Investments

‡Retirement Plan Services

We challenge the status quo through **complete transparency** and by following our own advice. We would never recommend investments that we wouldn't use ourselves. We use words like **Responsive**, **Personal** and **Memorable**, and back them up with actions.

We have helped many people on the way to meeting their financial goals. We will do the same for you.

NICOLETBANK.COM

800.369.0226

Nicolet
WEALTH MANAGEMENT

Investment and insurance products:
Are Not FDIC Insured • May Lose Value
Are Not Bank Guaranteed • Are Not Deposits
Are Not Guaranteed by Any Federal Government Entity • Are Not a Condition to Any Banking Service or Activity

Nicolet Wealth Management is a brand name that refers to Nicolet National Bank and certain of its departments and affiliates that provide investment advisory, trust, retirement planning and insurance services.

Nicolet Advisory Services, LLC, is an investment adviser, registered with the U.S. Securities and Exchange Commission, and an affiliate of Nicolet National Bank. Nicolet Advisory Services, LLC recommends the brokerage and custodial services of TD Ameritrade, Inc., member FINRA/SIPC. TD Ameritrade is not affiliated in any way with Nicolet National Bank or its affiliated companies.

Securities offered through Private Client Services ("PCS"), member FINRA/SIPC. PCS is not affiliated with Nicolet National Bank, Nicolet Wealth Management or Nicolet Advisory Services.

Trust services are offered through Nicolet National Bank, a national bank with trust powers. Trust services utilizes SEI Private Trust Company (SPTC) as its custody provider. SPTC is not affiliated in any way with Nicolet National Bank or its affiliated companies.