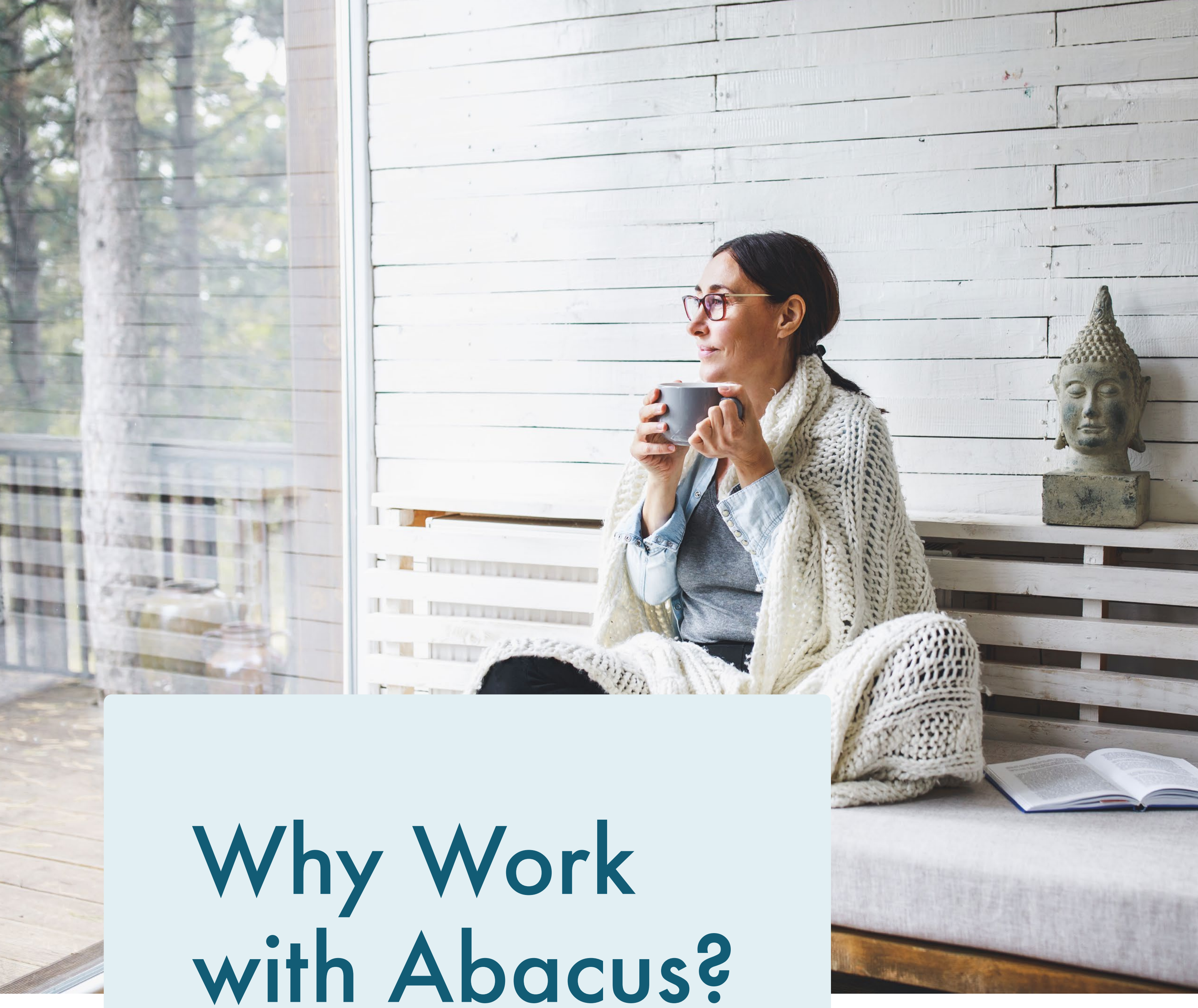


Why Work with Abacus?

Simplify your life with a financial plan that connects you to what matters most.

ABACUS

ABACUS WEALTH PARTNERS
abacuswealth.com

WHY WORK WITH ABACUS?

Start expanding what's possible with your money.

Connect your money with what matters most and experience a sense of enough here and now, not just in the future.

"Will I have enough?"

Whether enough means the freedom to work less or not at all, having a positive impact on something you care about, more family time, or traveling the globe, we'll help you plan for what matters most.

We take care of the messy details so you don't have to.

We know the overwhelm and anxiety you feel from conflicting financial priorities. No matter your financial means, we transform complexity into empowerment and possibility.

HOW WE HELP

Find ease in your financial life and free up your time and energy for what matters most.

Professional Expertise

– Goal Planning and Projection
– Investment Management & Advice
– Specialty Planning Topics
– Tax Saving Strategies
– Estate Planning Strategies
– Risk Management
– RSUs and Equity Compensation

Counseling

– Help Prevent Costly Mistakes
– Financial Education & Empowerment
– Sounding Board
– Second Opinion & Neutral Party

Convenience

– Accountability Partner
– Collaborating with Other Professionals
– Time Savings

Values Alignment

– Investments
– Charitable Giving
– Financial Literacy for Children
– Multi-Generational Planning

COMPREHENSIVE FINANCIAL PLANNING

As your life changes, your personal financial plan has to be flexible enough to evolve with it. Throughout the financial planning process your Abacus advisor will explore six core areas by using a time-honored roadmap that prioritizes your most important questions first.

VALUES-ALIGNED PORTFOLIOS

Our investment philosophy is based on Nobel Prize-winning academic research and decades of empirical evidence. Each of our portfolios reflects our investment principles of being both global and well-diversified, with investments that contain positive social, environmental, and/or governance (ESG) characteristics.

We emphasize a long-term, disciplined perspective and do not attempt to time the markets or predict winners or losers. Research and our years of experience confirm that when portfolios are constructed in this way, we can better align your money with your values without sacrificing returns.

Sustainable Portfolio

Prioritizes addressing climate change via greenhouse gas emissions while also considering related sustainability concerns such as a company's land use, toxic waste production, and water management.

ESG Portfolio

Favors a combination of greenhouse gas emissions reduction, climate innovation, DEI and human rights, corporate board diversity and CEO pay, underserved community development, and affordable housing.

Social Justice Portfolio

Integrates racial, gender, economic, and climate justice metrics. The core equity holding, Adasina's JSTC ETF, focuses on intersectional justice issues such as subminimum wages, money bail, land rights, predatory lending, and extractive agriculture.

THE ABACUS CLIENT JOURNEY

Our unique planning process combines financial analysis with emotionally intelligent insights to show you where you are and where you want to be. This process happens in three phases.

PHASE 1
Awareness

Explore values, goals, and current financial picture.

PHASE 2
Intention

Optimize financial life and begin implementation.

PHASE 3
Balance

Monitor and adjust to sustain results.

A TEAM-BASED APPROACH

With an entire team on your side, you benefit from the enormous wealth of skills, knowledge, and heart that multiple advisors bring. You can trust that someone well-versed in your financial plan will always be here — whether your primary advisor takes a vacation, requires medical or parental leave, or retires. Our team approach ensures you receive the best possible service from us.

FIDUCIARY

We always act in your best interest.

FEE-ONLY

No commissions or kickbacks.

CFP®

All advisors are CERTIFIED FINANCIAL PLANNERS™, a rigorous education program similar to the bar exam.

OUR PURPOSE

To expand what's possible with money.

OUR CORE VALUES

Financial advice is "what" we do. Core values are "how" we do it.

Serve Others

We put the needs of our clients, the team, and our community above our individual desires.

Listen Deeply & Speak with Care

We come to each conversation with an open mind rather than having the "right answer." We tell the whole truth to ourselves, our clients, and each other.

Bring Genius

We spend our time doing what we are best at and love most.

Enjoy!

We believe that our time with Abacus should be the best years of (y)our life.

~$3B
Assets Under Management

1,500+
Client Households

42 STATES
Serving Clients Across the Country

20+
Years in Business

INITIATIVES AT ABACUS

Women & Money

When women support each other, incredible things happen. Abacus offers comprehensive financial services to women across many walks of life to help them feel empowered to thrive.

LGBTQ+ & Money

At Abacus, we celebrate diversity with pride. Being LGBTQ+ in today's world is both liberating and challenging. Come as your whole self and work with people who support you and are sensitive to your unique needs.

Pro Bono Financial Planning

Through Abacus' pro bono program, hundreds of individuals and families who don't meet typical minimums required by financial advisors now have access to the highest standard in fiduciary advice – the same high level provided to each one of our paying clients.

B CORP – A FORCE FOR GOOD

As a founding B Corp, we use business as a force for good. Certified B Corporations are businesses that meet the highest standards of verified social and environmental performance, public transparency, and legal accountability to balance profit and purpose.

It's a certification that looks at our entire company and the impact we have on our workforce, suppliers, community, and the environment.

DEI AT ABACUS

As a purpose-driven, values-centric financial advisory firm, we are focused on creating authentic and measurable impact. We do this by effecting change in the financial services industry to create and serve a more diverse and equitable profession and client base.

50%
of our CFP®s are Female vs. 23% for the Industry

55%
of our Owners are Women

34%
of our Employees are People of Color

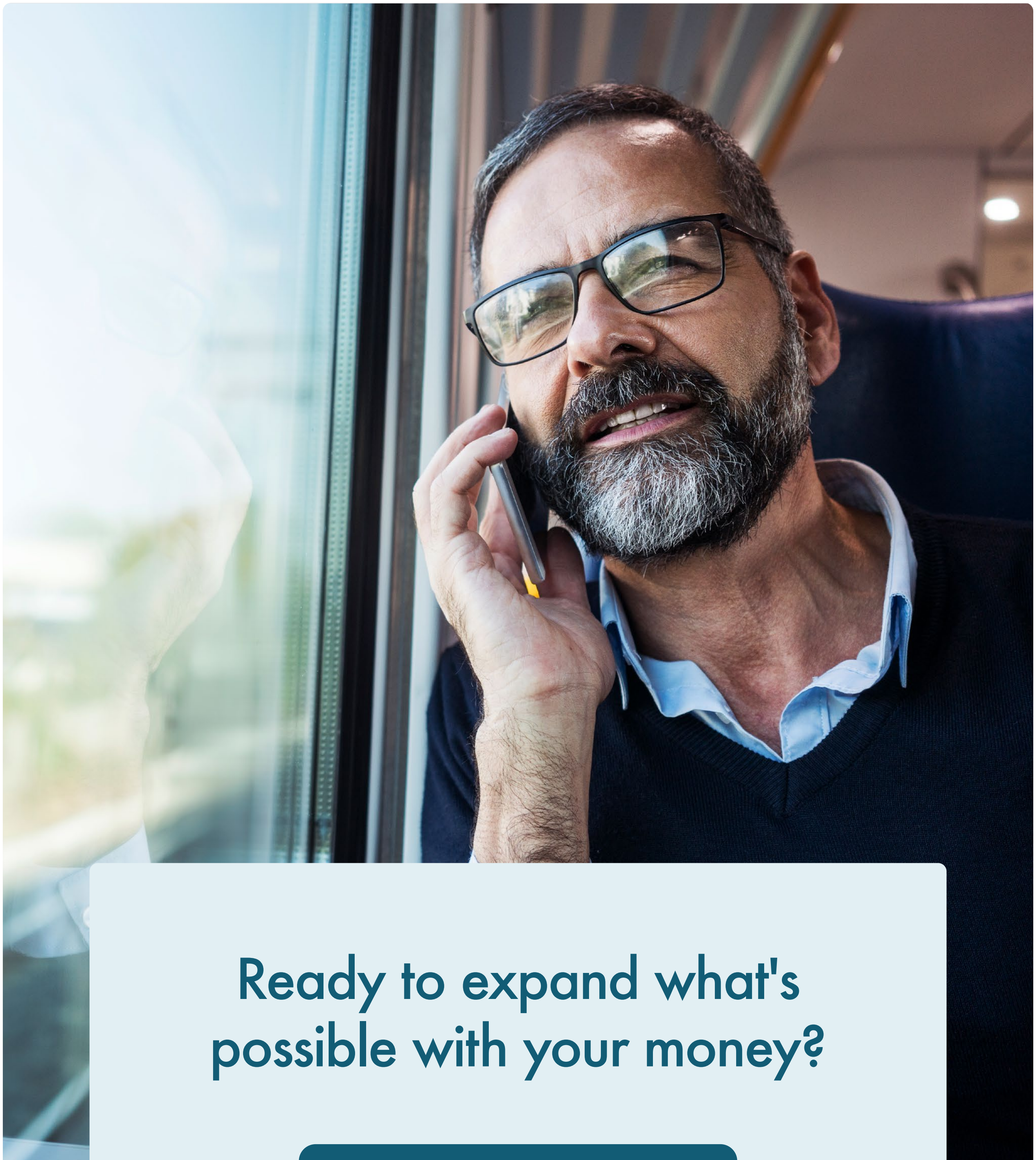
18%
of our Owners are People of Color

23%
of our Advisors are People of Color

12%
of our Employees Identify as LGBTQ+

30%
of our Employees are Owners

15%
of our Advisors Identify as LGBTQ+



Ready to expand what's possible with your money?

SCHEDULE A CALL

abacuswealth.com/getstarted

ABACUS