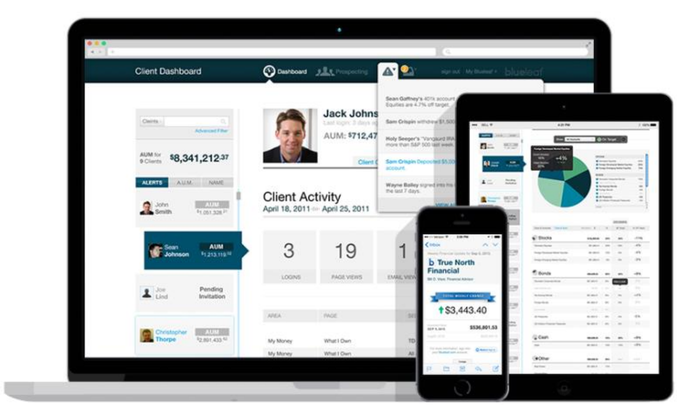
Client-Centered Technologies

At Prescott Tax & Wealth Management, we recognize that every great company has great client-centered technology at its foundation. As such, we continually seek out best-of-breed industry technology solutions to ensure we are efficient and effective in delivering sound financial advice and attractive risk-adjusted investment returns. Several of the technologies you might like to know about are as follows.

Riskalyze

Riskalyze is a system developed on Nobel Prize-winning research in behavioral finance. This research underpins the argument that average investors underperform the market consistently over time because they invest based on emotional impulses that cause them to sell at market lows when fear has gripped the markets and buy at market highs when they feel like they're missing out. Therefore, knowing one's risk tolerance can serve as a powerful tool in developing portfolios that are a good fit, being defined as a portfolio that has downside exposure within an investors tolerance, thereby allowing them preempt the urge to move their investments to cash at what are often the most inopportune times.

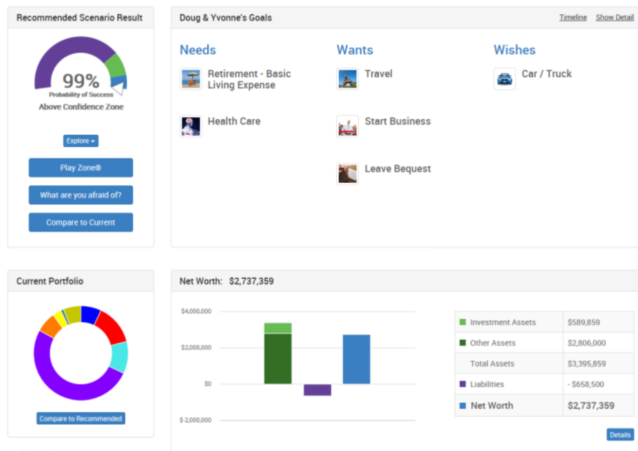
By completing a short Riskalyze risk tolerance questionnaire, we can gain an even more precise measure of your willingness to tradeoff between risk and reward. Your "Risk NumberTM" helps us identify a tailor-fit investment option for you. And if interested, we can also use Riskalyze to evaluate whether other investments, or better, your entire investment portfolio (e.g. investments held elsewhere such as in 401Ks or in other brokerage accounts) is appropriately-fitted to your risk tolerance. Reach out to Troy by email to troy@prescott500.com or by phone at (949) 248-9815 x4 to get your Risk NumberTM!



Blueleaf

We are also in the process of implementing a new reporting system called Blueleaf. We are confident that you will find this system to be an improvement to our current reporting system. It offers easier access, clearer details, more frequency in reporting and via multiple devices. And as with Riskalyze, it offers a significant benefit by allowing you to see your investments in a more holistic perspective. By adding other assets and liabilities, whether entered manually or by entering login credentials to other accounts, your “dashboard” becomes your net worth summary. Testimonials have resoundingly demonstrated that this “net worth perspective” serves to be more meaningful and actionable in gaining control over their finances and financial futures. Here again, we look forward to exploring what Blueleaf can do to help you unlock better financial outcomes.

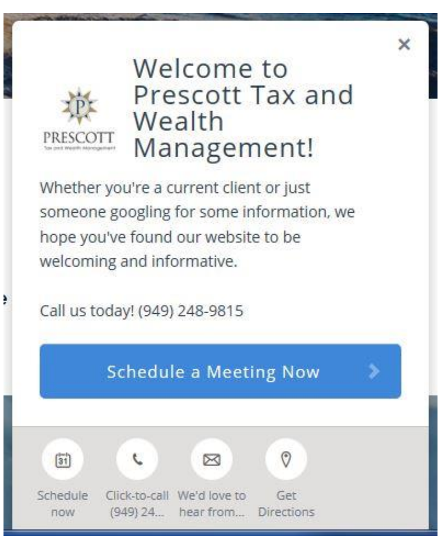
MoneyGuidePro



Late last year we implemented MoneyGuidePro, an industry-leading goals-based financial planning system. MoneyGuidePro allows us to better understand your goals and help you get on a path to achieve them. The advanced nature of this system allows you to easily brainstorm about needs, wants and desires leading up to and through retirement, to prioritize among them, and to help us determine the steps required to achieve them. We have already had very positive experiences using it with clients and we seek to engage with you on this very important step toward bringing your life plans into view and then within reach.

vCita: On-Line Appointment Scheduling

At Prescott Tax & Wealth Management, we realize that much of the value we provide is by way of meetings with you. In order to make scheduling a meeting with us easier and to save you time, we have



implemented on our website at www.prescott500.com, an on-line scheduling system that allows you to request an appointment time at any time of day without having to talk to us directly. By clicking on the “Contact” link at the lower right corner of our webpages, you will be able to access our calendars directly and find days and times that work with your availability. After submitting your choices, we will promptly confirm your request. What’s more, this new system will send you reminders in advance of your meeting, so you can plan accordingly and let us know in advance should you not be able to keep your appointment. I encourage you to schedule your upcoming tax appointment by clicking the “Contact” button at the bottom of our website pages and select “Schedule Now” to make your appointment.