Future Wealth

Keys to achieving growth of your portfolio

Let's be realistic here. Investing in the stock market is intimidating, but it does not have to be. Most wealth advisors recommend products that trigger commissions in addition to advisory fees and transaction fees. On the other end of the spectrum you have robo-advisors who offer low management fees but offer minimal choices and no advice on the choices that are best for you.

But if you choose carefully, you can have the best of both worlds. In fact, at Future Wealth LLC we will put your money to work in low cost investments with low advisory fees. The savings add up, enabling you to a financial future that will make you and your family secure for your upcoming years.

Our beliefs

Here at Future Wealth LLC we understand that you shouldn't have to pay 2-3% per year in advisory fees, management fees, transaction fees, and hidden fees to get management advice from someone that has neither worked on Wall Street nor is willing to give your portfolio full attention.

We have created a fee structure that will not exceed 1% per year.* Contact us to find out how we choose low cost investments and provide superior advisory services.

*For investments above $900K

Experience matters

Jay Srivatsa is the CEO and founder of Future Wealth LLC. Prior to starting Future Wealth in 2016, Jay spent 10 years in Wall Street investment banks as an equity analyst recommending technology stocks to mutual and hedge fund managers. Before he joined Wall Street, Jay spent his first 10 years after graduate school working at Silicon Valley tech firm Avago Technologies, and another five years in market research at Gartner and iSuppli, Inc. Jay holds an MS in Economics and Operations Research from Stanford University, and MBA from Santa Clara University, and an MS in Industrial Engineering. He holds Series 7, 24, 63, 65,86 and 87 securities licenses.

Fee structure

Investments ($)	Annual Fees
$100,000 - $200,000	$2000
$200,001 - $300,000	$3000
$300,001 - $900,000	$6000
$900,001 - $3M	0.70%
$3M - $6M	0.60%
$6M - $8.5M	0.55%
$8.5M - $10M	0.53%
> $10M	0.50%

- All investments require initial set up fee of $3000 - $5000
- $100,000 account minimum
- Transaction fees of $7 per trade is extra and will be charged by custodian

FOR MORE INFORMATION PLEASE EMAIL **JAY@FUTUREWEALTHLLC.COM**

Future Wealth LLC | jay@futurewealthllc.com | 408-839-4430 | **www.futurewealthllc.com**

Future Wealth products and services

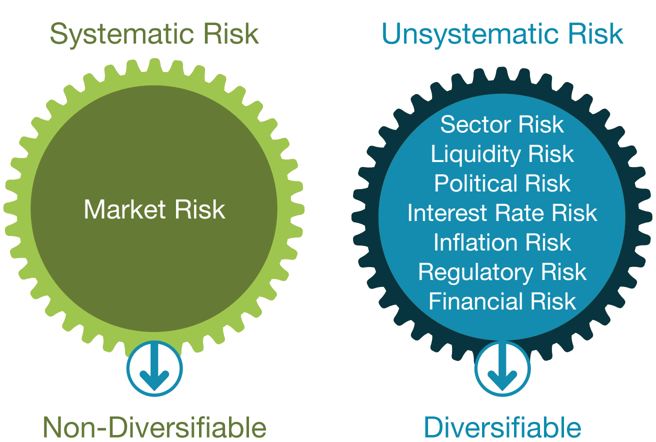
Investment Portfolio Planning

- Brokerage accounts
- Joint accounts
- IRA (Traditional, Inherited, Rollover and Roth IRA) accounts
- Custodial (UTMA, UGMA, Coverdell) accounts
- Business Accounts

Wealth Management

- Cash flow planning for retirement
- Overall portfolio and risk analysis
- Consultation on 401K and 529 plan investment choices
- Capital needs and net worth analysis

Utilizing tools to mitigate risk



At Future Wealth, we utilize tools to mitigate both types of risk.

INVEST WITH FUTURE WEALTH

- ALL INCLUSIVE LOW FEE ONLY SERVICE
- CUSTOMIZED PORTFOLIO OF INVESTMENTS
- UNLIMITED ACCESS TO ADVISOR
- NO HIDDEN FEES OR COMMISSION
- ALWAYS ACTING IN YOUR BEST INTEREST

Jay Srivatsa is an investment advisor representative of and offers investment advisory services through Future Wealth, LLC, a registered investment adviser offering advisory services in the State of California and other jurisdictions where registered or exempted.

Main Office: PO Box 33187, Los Gatos, CA 95031-3187.
Tel: 408-839-4430