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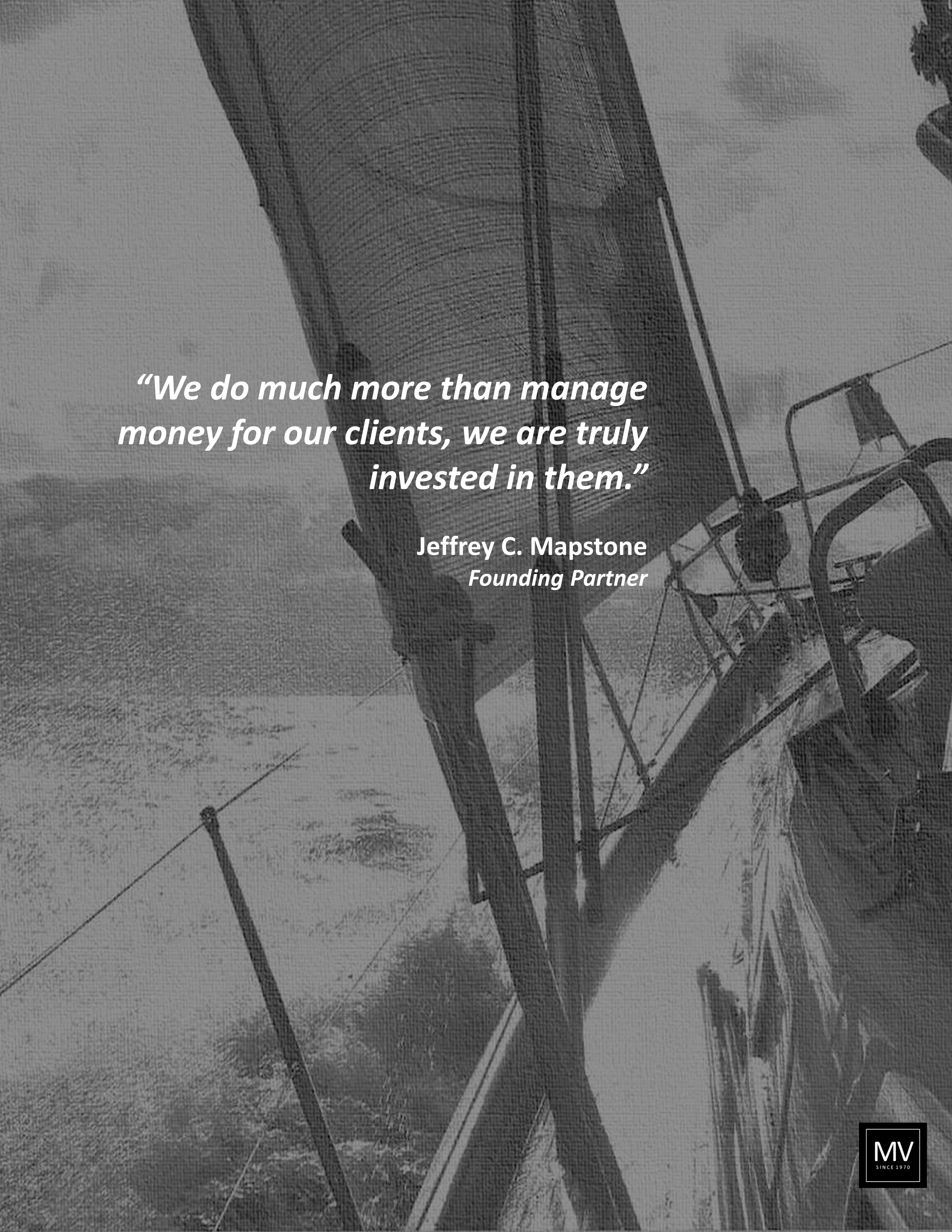
MAPSTONE | VERITAS

COMPREHENSIVE WEALTH MANAGEMENT

ADVICE | EXPERIENCE | RESULTS | *SINCE 1970*



"We do much more than manage money for our clients, we are truly invested in them."

Jeffrey C. Mapstone
Founding Partner

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COMMITMENT TO WHAT MATTERS MOST |

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OUR FIRM

Since 1970, Mapstone | Veritas has been providing asset management strategies and wealth planning tools for successful individuals, their businesses, and families. We have built our firm with the idea of being viewed as the reliable and trusted advisor for our clients as they navigate through life.

COMPREHENSIVE WEALTH MANAGEMENT

New clients consistently express their frustration that even though they have received sound advice in a specific area, this advice is often without regard to their overall financial plan or long-term goals.

They indicate that they want someone who can take the lead. They want someone who commits to their overall financial goals and who will develop and coordinate a fully comprehensive plan. At Mapstone | Veritas we have built our firm to do exactly that.

EXTENSIVE RESOURCES

We have access to a wide array of professionals, including those with backgrounds as CPAs and attorneys, in order to help our clients achieve holistic financial success.

HOW WE WORK WITH YOU |

CONFIDENTIALITY |

Your trust in us is of utmost importance. Accordingly, we have a strict client-advisor privacy policy. Everything we discuss now and in the future will be held in confidence.

COMPENSATION |

Our compensation depends on the services provided and may include fees and/or commissions. We ensure product neutrality by providing an equalized cost structure amongst all companies and products in our network.

CUSTOMIZED STRATEGIES |

After reviewing the specifics of your financial situation, we can mutually determine which, if any, of our services might be appropriate for you.

REFERRALS|

Our goal is to provide you with exceptional service. As a result of that service, we aim to earn your recommendation and hope to gain introductions to people you know who may also benefit from our services.

HERE FOR YOU |

UNDERSTAND YOUR SITUATION
The most important work we do is getting to know who you are. When we work with people as individuals, not dollars and cents, that's when we deliver on our mission.

RESPECT YOUR ASSETS
There are reasons for the decisions you've made so far. We listen, learn and build on your existing assets – respecting choices you've made.

PROFESSIONALS ALONGSIDE YOU |

EDUCATE YOU ON YOUR OPTIONS
When you have personal and practical questions, we'll be ready with answers about the options that can help you make the most of what you've earned and saved.

PROVIDE CLEAR RECOMMENDATIONS
A fulfilling life can mean something different to everyone. With insight and clarity, we offer new ways to help you make your own life's most important decisions.

EVOLVE WITH YOU |

TRACK YOUR PROGRESS
We believe in giving you the knowledge and time you need to understand performance and, more specifically, progress toward the goals you've communicated to us.

STAY IN CONTACT
As the world and your goals change over time, your financial strategy should as well. With guidance designed for you and products built to meet your needs at every stage of life, we help you secure your well-being, so you can live the life that's most meaningful to you.

DETERMINING YOUR NEEDS |

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5 We use a five step approach to determine your needs and develop a plan designed to ensure financial success.

1 Discovery

- Assess your current financial situation
- Identify your priorities and concerns
- Present the process

2 Profile

- Gather information and establish priorities
- Analyze your data

3 Strategy

- Present the results of your analysis
- Discuss priorities and future steps

4 Action

- Review your specific recommendations
- Select suitable products and services
- Develop an implementation schedule for products and services

5 Review

- Review your implementation schedule
- Analyze your review checklist
- Assess necessary changes or enhancements

BUILDING YOUR FINANCIAL FUTURE|

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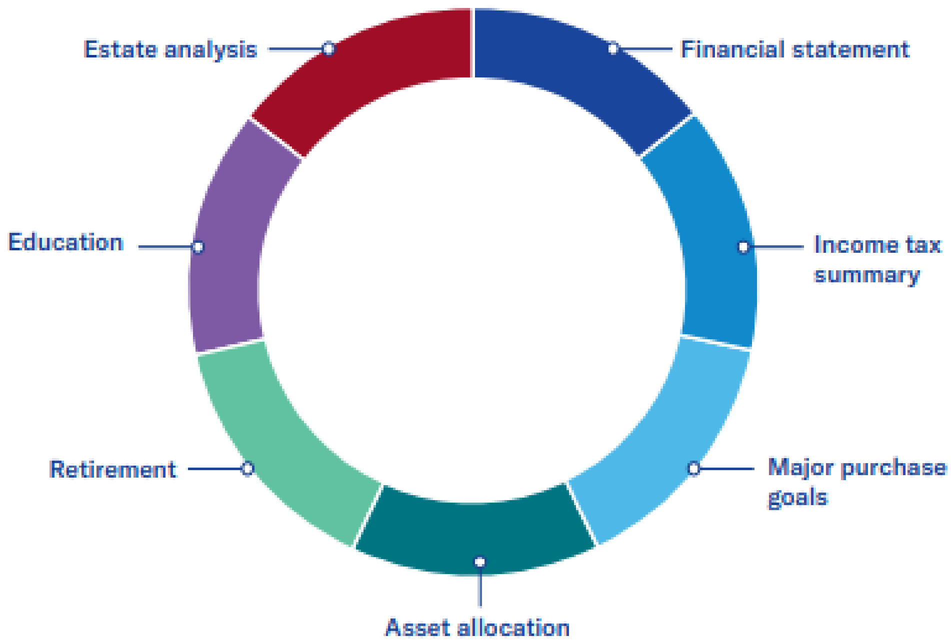
Financial statement	Review cash inflow, outflow and net worth.
Income tax summary*	Estimate your taxable income and the impact on your savings and investment programs.
Major purchase goals	Develop an understanding of your specific savings needs.
Asset allocation	Determine what proportion of your portfolio holdings to invest in various asset classes.
Retirement*	Plan the accumulation and distribution aspects of retirement.
Education	Estimate the future cost of tuition and related expenses to design a plan to help meet them.
Estate analysis*	Arrange for an efficient, cost-effective property transfer.
Risk management	Plan for disability, long-term care, survivor needs and other concerns.



Risk management

*Mapstone Veritas Financial Group does not provide legal, accounting or tax advice.
You should consult your own legal and/or tax professional for such advice.

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MAPSTONE|VERITAS
755 JEFFERSON RD
THIRD FLOOR
ROCHESTER.NY 14623
www.mapstoneveritas.com

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