BONAVENTURA
wealth advisors

AN INDEPENDENT FINANCIAL ADVISORY FIRM

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Bonaventura Weath Advisors specializes in helping individuals plan for their financial needs. Through independent thinking, comprehensive advice and exceptional service, our firm aims to support our clients in reaching their financial goals. As an independent registered advisory firm, we answer to our clients, rather than a parent company with its own agenda. As a fiduciary, we are legally bound to put clients' interests first in any decision we make or recommendation we provide. We pride ourselves on always doing the right thing for those we serve.

- As independent advisors we have no proprietary products or obligations to outside investment companies that can lead to conflicts of interest.
- Our relationship with you is based on honesty, trust, respect, and our ongoing commitment to your success.
- We provide education, helping to empower you to make well-informed decisions about your financial future.

- We develop personalized strategies, unique to your needs and aligned with your individual goals.
- We are committed to remaining at the forefront of industry innovation and developments by continually educating ourselves, tracking market trends, and employing leading edge technology for your benefit.

OUR **MISSION**

We are committed to bring clarity,

organization and financial peace of mind

to the clients we serve.

We will treat our clients in a manner in which

we would like to be treated and deliver value

through our strategic guidance,

comprehensive advice and personal service.

Ryan Bonaventura

RYAN BONAVENTURA
President and Founder
Bonaventura Wealth Advisors

OUR **SERVICES**

INVESTMENT MANAGEMENT

Through the use of a diverse option of investment strategies, we seek to create an investment portfolio tailored to your objectives. We monitor your investment portfolio to ensure your assets are strategically allocated and adequately diversified over time, based on your needs and risk tolerance.

FINANCIAL PLANNING

Our planning service is driven by matters that are most important to you, but we also take a comprehensive approach to ensure all facets of your financial plan are sound. Our Financial Planning service is designed to align with the stages of your financial life and goals:

WEALTH ACCUMULATION:
"WORKING YEARS"

- Ongoing advice on all general financial planning questions and concerns
- Pre-retirement Planning
- Education Planning
- Savings and Investment Planning
- Portfolio Investment Strategy and Asset Allocation
- Insurance and Risk Management Planning
- Financial Organization

WEALTH DISTRIBUTION PLANNING:
"RETIRED YEARS"

- Ongoing advice on all general financial planning questions and concerns
- Retirement Cash Flow Planning
- Tax Efficient Strategies
- Pension Election Planning
- Social Security Planning
- Portfolio Investment Strategy an Asset Allocation
- Insurance and Risk Management Planning

ESTATE PLANNING:
"LEGACY"

- Ongoing advice on all general financial planning questions and concerns
- Asset Registration and Beneficiary Designations
- Wills, Estates and Trust Strategies
- Gifting Strategies and Planning
- Insurance and Risk Management Planning

OUR **PROCESS**

We view Financial Planning as an ongoing and evolving relationship. Our process is designed to allow changes to your financial plan as your life progresses.
This includes:

1. Initial Information Gathering:
We get to know you and learn about your financial goals.

2. Recommendations and Presentation meeting:
We present "what we would do if we were you".

3. Client Engagement Terms and Account Opening:
A relationship is established along with our assistance implementing financial planning recommendations.

4. Ongoing Review Meetings and Financial Planning:
Advisor and client meet to review their financial plan, monitor its progress and make any necessary updates or changes.

- As Investment Advisory Representatives of Bonaventura Wealth Advisors, we manage client accounts for a fee which is based on the value of the assets in the accounts. Financial Planning services are provided at no additional charge for clients who maintain sufficient assets under our firm's management. A fee schedule is available upon request.

- Financial Planning/Consulting services are also available when advice or financial planning analysis is desired without our firm managing assets. Clients will either be billed a flat or hourly rate, as disclosed by the advisor before services are rendered.

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