

# LBMC INVESTMENT ADVISORS, LLC

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AN AFFILIATE OF LATTIMORE BLACK MORGAN & CAIN, PC



A COMPREHENSIVE APPROACH TO ACHIEVING YOUR PERSONAL FINANCIAL GOALS

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MORE THAN YOU EXPECT...  
EVERYTHING YOU NEED



## IT STARTS WITH CAREFUL CONSIDERATION

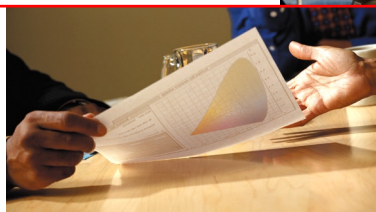


Consideration is everything when it comes to financial planning. At LBMC Investment Advisors, LLC, we consider all the components that affect your financial well-being. Income management. Investment planning. Tax considerations. Estate and gift laws. Your goals, your dreams, and your family.

Drawing from our extensive knowledge of your personal financial picture, we tailor a plan designed specifically for you. Unlike year-end fixes offered by some financial sources, LBMC Investment Advisors provides comprehensive counsel to keep your objectives on course throughout the years. We view the whole picture and each individual element to ensure that your assets are always working to your greatest advantage.

Carefully selected investment strategies / managers, noted for success in specific investment areas will be commissioned by LBMC for components of your portfolio. Using cutting edge technology and significant economies of scale, we can help improve your portfolio's performance by maximizing after-tax returns.

As you interact with our staff, you'll discover that we are personable as well as professional. The team of individuals working for you will become well-acquainted with your needs, always looking to better your position while maintaining strictest confidentiality.





## FOUR STEPS TO INVESTMENT SUCCESS

In our work with hundreds of individuals, we've devised a four-step process which offers the greatest amount of freedom, security, and growth.



### 1. LISTEN TO YOUR OBJECTIVES

At LBMC, we don't believe in cookie-cutter solutions. That's why your investment plan is created specifically for your needs. In order to best serve you, we begin by listening as you describe your goals and objectives.



### 2. CREATE A STRATEGY THAT WORKS

To formulate a plan that meets your needs, we begin by analyzing your current asset allocation for performance and volatility. We then build a list of recommendations with careful regard for how they individually and collectively advance your position. Paying particular attention to the tax aspects of your investment choices. You incur no charges and are under no obligation until we implement a strategy that you endorse.

### 3. IMPLEMENT YOUR STRATEGY

Whether using separate account managers or multi-style, multi-manager mutual funds, we'll transform your strategy into a comprehensive initiative geared to meet your current income needs and future capital requirements.

### 4. REVIEW YOUR PLAN CONTINUALLY

Over time, your needs may change and new opportunities may arise. As your client, we consider it our responsibility to look out for your best interests throughout the year, always seeking the best ways to achieve your long-term investment objectives.

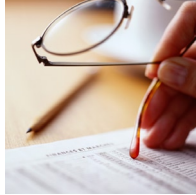
### GROWTH BEGINS HERE

To initiate a relationship that surpasses traditional investment management, call LBMC Investment Advisors at 615.377.4600. We'll listen to your goals and guide you along a practical path toward making your dreams come true.



## Discover the LBMC Difference

At LBMC, we are constantly pursuing ways to serve our clients better through our expanding family of services. Over the years, we've realized that the more we do for our clients, the stronger a resource we become. Today our comprehensive service offering is truly unique, providing our business and individual clients with solid solutions to a wide array of challenges. We're more than you expect. We're everything you need.



**The LBMC Family of Companies**

LATTIMORE BLACK MORGAN & CAIN, PC

LBMC TECHNOLOGIES, LLC

LBMC EMPLOYMENT PARTNERS, LLC

LBMC STRATEGIC STAFFING, LLC

LBMC INVESTMENT ADVISORS, LLC

LBMC PLANNING SERVICES, LLC

LBMC eHEALTH SOLUTIONS, LLC

LBMC MANAGED SECURITY SERVICES, LLC



**LATTIMORE BLACK MORGAN & CAIN, PC**  
A N D A F F I L I A T E S

W W W . L B M C . C O M

LBMC FINANCIAL CENTER

5250 VIRGINIA WAY • P.O.BOX 1869 • BRENTWOOD, TN 37024-1869  
615.377.4600

10024 INVESTMENT DRIVE • KNOXVILLE, TN 37932  
865.694.4008

ONE UNION SQUARE, SUITE 700 • CHATTANOOGA, TN 37402  
423.756.6585