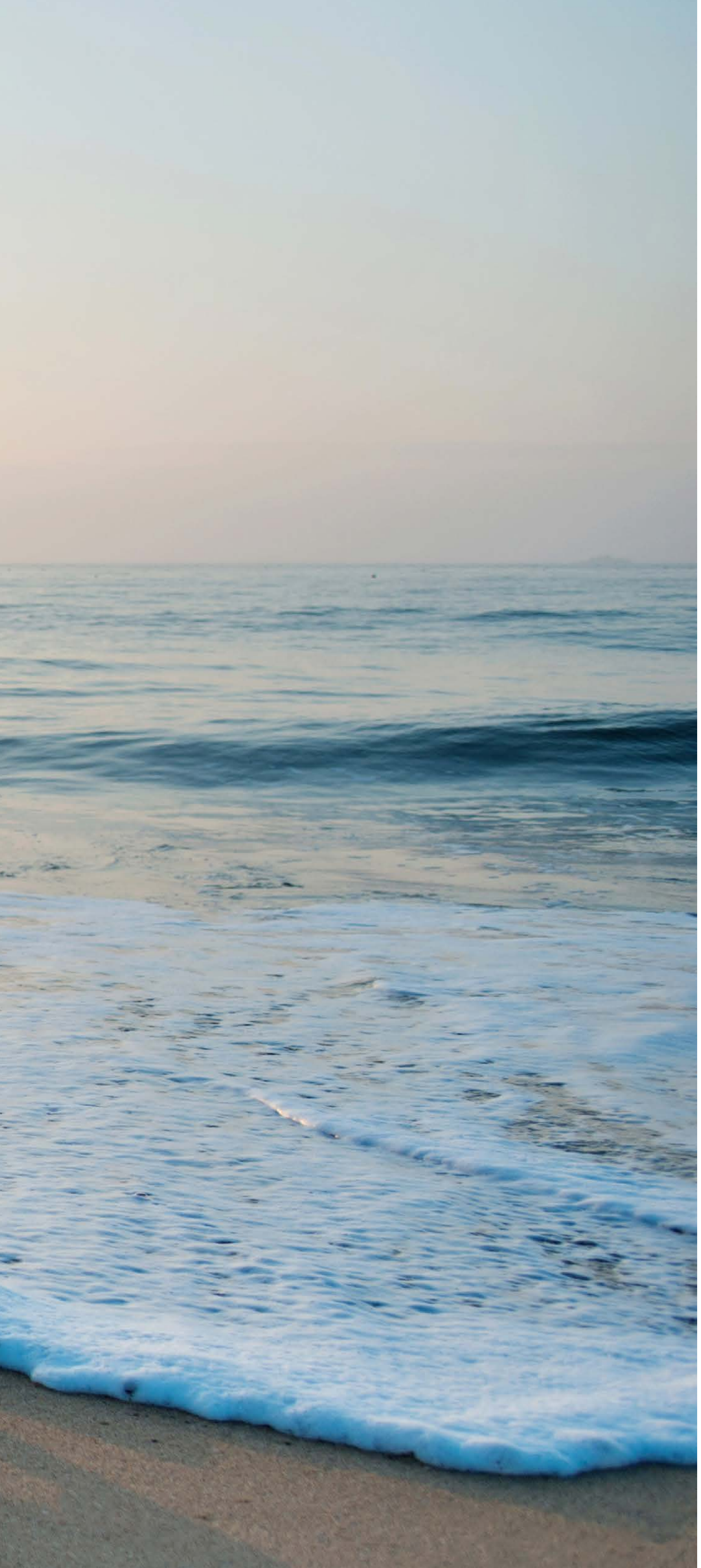
MEYER CAPITAL GROUP
FIDUCIARY WEALTH MANAGEMENT

NAVIGATING YOUR FINANCIAL FUTURE

Chart a course with a fee-only financial advisor.
Discover the difference.

TRUST



To Serve, Not Sell

Since 1963, when our current CEO Tom Meyer's grandfather started the firm, Meyer Capital Group has been helping families preserve and grow their wealth. Today, with $1.7 billion in assets under management,[1] our clients rely on our experience to help them achieve financial comfort, an enjoyable retirement, and a lasting legacy.

Too often in this industry, it can be difficult to understand the kinds of services and expenses that you can expect when working with a financial advisor. While some practices can be compensated by third parties (by driving clients to commissionable or profitable investment products), we are here to serve, not sell. "Your Interest Before Ours" is our guiding principle. As full-time, fee-only fiduciaries, our compensation comes from our client management fees. If you don't succeed, neither do we.

As our clients' wealth has grown over the past six decades, we realized we needed to offer a more sophisticated suite of services and solutions to meet their needs. In 2023, we selected Hightower Advisors, one of the largest RIA firms in the country,[2] as our partner in this endeavor. With this alliance, we have increased our ability to serve as true fiduciaries, providing a broad spectrum of investment solutions and client services, as well as the business resources needed to support our practice.

[1] As of March 2024

[2] Hightower ranked second of Barron's 2023 Top 100 RIA Firms. Website accessed April 22, 2024. For more information, visit: https://www.barrons.com/advisor/report/top-financial-advisors/ria?page=1&

In Your Best Interest

As fiduciaries, Meyer Capital Group is committed to applying our top standards when guiding our clients. We’re not sales people, we’re fiduciaries, working diligently to find appropriate solutions for you and your family in order to help preserve and grow your wealth.

Many individuals these days are considered financial advisors, but only a small number can call themselves fee-only fiduciaries, and an even smaller number actually conduct business all of the time as true fiduciaries. As such, Meyer Capital Group will never accept referral fees for compensation that is contingent on the sale or purchase of a financial product.

Who We Serve

Meyer Capital Group serves a diverse body of clients with varied needs and objectives. Whether you're a small business owner, head of a large, established firm, first-time homeowner, or retiree, you'll receive the same level of conflict-free advice to help you clarify your financial picture and reduce your financial stress. Through a systematic, goals-based investment process, and long-term, proactive planning, we will help you navigate ever-changing market conditions. It's also our job to address new challenges, like changes in the tax code and economy, as well as help you tackle other personal obstacles that may arise in your future.

MAKING AN IMPACT

Environmental, social, and governance (ESG) refer to the three main areas of concern that have developed as central factors in measuring the sustainability and ethical impact of an investment. We can help you to align your portfolio and your core values. Take an Impact Assessment here.

PERSONAL SERVICE

"Investment management is a relationship business. Meyer Capital Group collaborates with you to provide a tailored approach to managing your portfolio and securing other financial services. By joining the Meyer Capital Group community, we will help you build a solid financial future."

-THOMAS C. MEYER AIF®, CHIEF EXECUTIVE OFFICER

Team Approach

At Meyer Capital Group, we seek to understand the needs of each individual client and then deliver experiences designed to leave lasting positive impressions. We build your service team from a staff of professionals with an average tenure of 15 years. We pair one-on-one personal attention with investment technology to deliver a comprehensive wealth management experience for each of our clients.

SERVICES

Investment Management

Accounting and Tax Analysis

Annuity and Insurance Reviews

Estate Reviews and Financial Planning

Trust Services

"The wind and the waves are always on the side of the ablest navigator."

-EDMUND GIBBON

TEAM

How We Serve

Our investment process is comprehensive, team-based, and personalized. We build investment strategies individualized to each client's unique situation. We then apply the strength of a dedicated and experienced team of investment professionals to construct a customized portfolio and financial assessment.

We'll help you define and prioritize your needs, wants, and wishes to put your current and future financial decisions into perspective.

ASSESS: We review your financial situation and help you define objectives, assessing current assets, income, debts, charitable, and legacy objectives. Once your short- and long-term goals are defined, we combine investment objectives that match your level of risk tolerance to consider your own personalized asset allocation strategy.

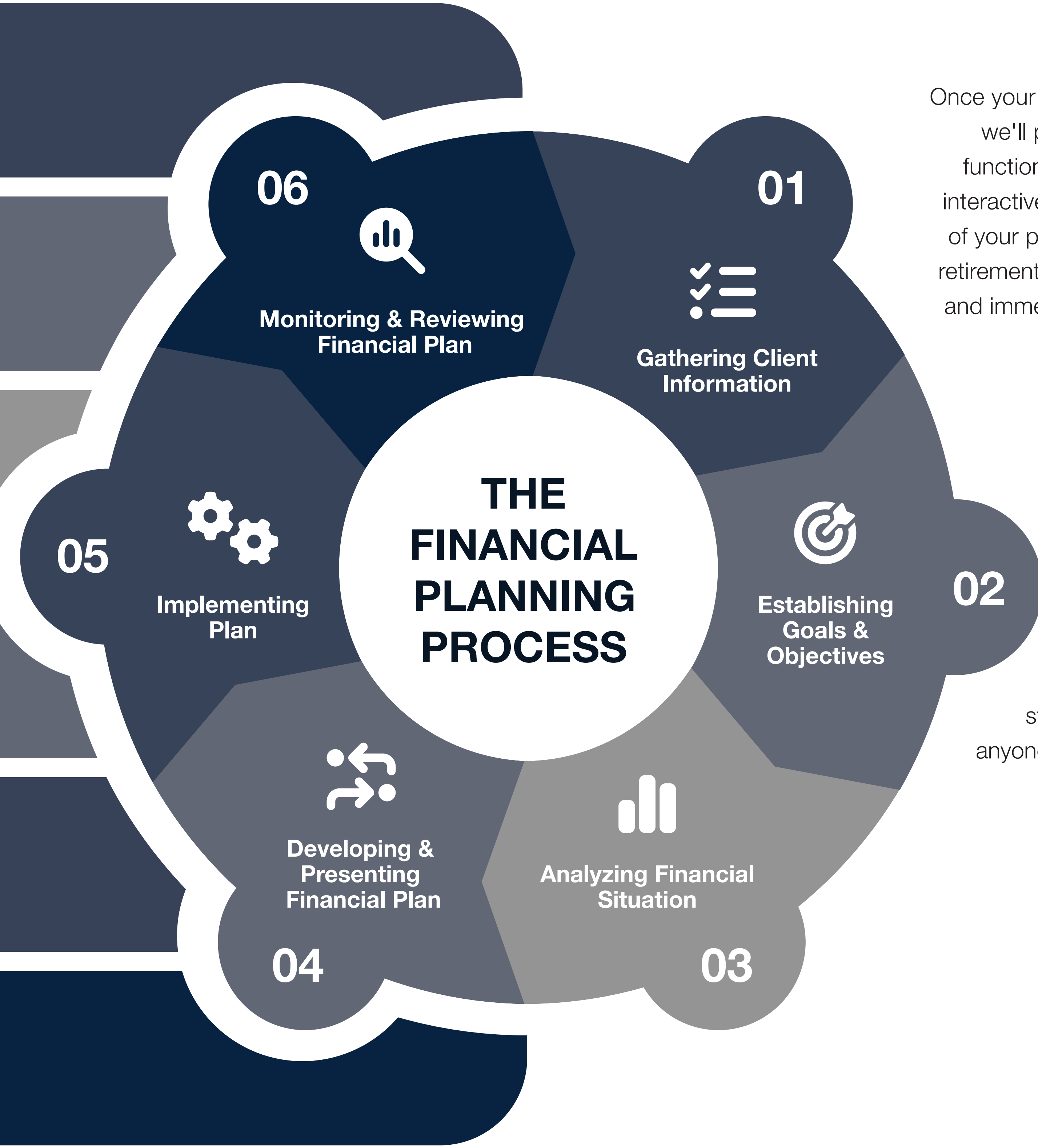
BUILD: After establishing your strategy, we begin to build your portfolio, as directed by your portfolio manager. By employing a variety of tools, including our due diligence process, we collaborate In a team environment to determine ideal positions for your portfolio.

OPTIMIZE: Tax loss harvesting and managing a tax-efficient portfolio are also an important part of our process. We'll consult with your CPA or tax attorney if necessary to determine your optimal tax situation for your specific circumstances.

ALLOCATE: Asset allocation is an investment strategy that attempts to balance risk versus reward according to the investor's risk tolerance, goals, and investment time frame. A variety of asset allocations offer risk tolerances ranging from very conservative to very aggressive.

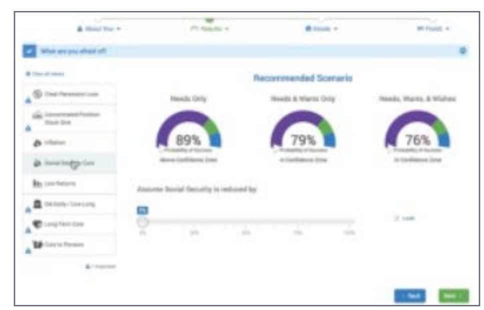
IMPLEMENT: A client's portfolio may potentially contain a combination of investments, including mutual funds, ETFs, stocks, and bonds. One size does not fit all! We select investments to help meet your goals. Periodic investment changes will be made based on market changes and conditions.

COMMUNICATE: The backbone of any relationship is good communication and transparency. Your team will review your portfolio and communicate with you several times a year. We are always available to answer any questions or assist you with new requests.



Once your personal baseline has been created, we'll provide you with access to additional functionality in our powerful software. These interactive features allow you to vary elements of your plan that are within your control, (e.g., retirement age, goals, expenses, and savings), and immediately see the impact on your long-term success ratio.

Additional powerful features allow you to stress-test the long-term strategy and plan for factors outside of anyone's control to answer tough questions with the move of a simple slider.



For Illustrative Purposes Only.

Corporate Values

HONESTY AND INTEGRITY:

As a full-time fiduciary, we uphold our clients' best interests.

COMMUNICATION:

Your client service team is always available to answer your questions or assist you with your requests.

TEAMWORK AND COLLABORATION:

At Meyer Capital Group, we believe our success is a reflection of the collective efforts and intelligence of our entire body of professionals.

RELIABILITY:

We take ownership of our responsibilities and put in the extra effort. Our clients can always count on us to get the job done, and done effectively.

DEDICATION:

When you speak with us, you'll hear our commitment and conscientiousness in our voices. When you visit us, you'll see the same in our faces.

Exploring New Directions

As you begin to consider how to manage your financial future with us, it's important to know that you are working with an experienced team of certified professionals (AIF®, CFA, CFP®, CIMA®, MBA, and Master of Science in Financial Services (MSFS)) that are committed to providing the highest standards in financial advice. There's little doubt that your financial goals may evolve over the years due to shifts in your lifestyle, or circumstances such as an inheritance, career change, marriage, house purchase, or retirement. We will work alongside you as your financial compass, helping you select smart investing strategies to keep you on the right course to meet your long-term goals.

Recognitions

Barron's
Top 100 RIA Firms | 2020-2023*

Inc.**
Inc. 5000 | 2012-2017, 2020, 2022
Best-Led Companies | 2021
Best Workplaces 2023***

USA Today's
Best Financial Advisory Firms 2023***

**Hightower has been named one of Barron's Top RIAs for 2023. Compensation was paid for the ability to use this logo in promotional materials.*

***Application fees were paid for Hightower Advisors to be considered for these Inc. rankings.*

****Compensation has been paid for the ability to use this award in marketing materials.*

"It is not the ship so much as the skillful sailing that assures the prosperous voyage."

-GEORGE WILLIAM CURTIS

Giving Back

Meyer Capital Group and our employees are proud volunteers and supporters of many local as well as national non-profits. We believe that the importance of giving back to others can't be understated and that the secret to living is giving.

Living Beyond Breast Cancer: Today, LBBC has expanded to assist women at all stages of diagnosis, treatment and recovery. Our mission includes offering specialized programs and services for the newly diagnosed, young women, women with advanced breast cancer, women at high risk for developing the disease, and African-American and Latina women. We also offer programs for caregivers and healthcare professionals to help them better meet the needs of women affected by breast cancer.

Ronald McDonald House: Ronald McDonald House of SNJ provides a home-away-from-home to families of seriously ill and traumatically injured children who are being treated at nearby hospitals and operates 11 Ronald McDonald Family Rooms within pediatric units of hospitals across the Southern New Jersey region.

Boys & Girls Club of Camden County: enable all young people, especially those who need us most, to reach their full potential as productive, caring and responsible citizens. The Club assures success is within reach of every young person who enters their doors, with all members on track to graduate from high school with a plan for the future, demonstrating good character and citizenship, and living a healthy lifestyle.

Alicia Rose Victorious Foundation: ARVF partners with children's hospitals throughout the United States to provide "Victorious 4 Teens" programs and Teen Lounges for teens and young adults with cancer or other life-threatening illnesses. "Victorious 4 Teens" programs, are age-appropriate and targeted to fill the gap between pediatric and adult care. Our goal is to give these brave teens something to do, "while they wait for the cure".

Hope Partnership For Education: Founded in 2002, Hope Partnership for Education is an independent education center that serves children, families and adults in eastern North Philadelphia who live below the poverty level and have struggled in traditional educational settings.

Autism New Jersey: Autism New Jersey is a nonprofit agency committed to ensuring safe and fulfilling lives for individuals with autism, their families and the professionals who support them. Through awareness, credible information, education and public policy initiatives, Autism New Jersey leads the way to lifelong individualized services provided with skill and compassion. We recognize the autism community's many contributions to society and work to enhance their resilience, abilities and quality of life.

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