A WINNING STRATEGY:
THE MCNAIR ASSET PLANNING PARTNERSHIP™

We have learned over the past 75 years that successful partnerships result when partners master and perform their designated roles. Our role is to continually guide you as you work to preserve and build your hard-earned assets. Your role is to make financial decisions that may help you reach your goals. As many times as your needs and goals may change, McNair & Company will take you through the McNair Asset Planning Partnership™ (MAPP™) to work towards ensuring that your actual financial picture resembles the one you have planned for yourself, your family or your business.

PHASE I – INVESTIGATION

McNair & Company helps you identify and articulate personal, family, business and retirement goals by asking questions that prompt examination of pertinent financial issues and facts. This examination enables you, and subsequently McNair & Company, to better understand your current financial situation and to assess where you are in relationship to your goals. In many cases, and always with your consent, McNair & Company will meet with your accountants, attorneys, financial planners or business partners to gain a broader understanding of your needs and to obtain the financial documents and reports required to conduct a thorough analysis. Thorough understanding leads to exceptional solutions.

PHASE II – ASSESSMENT & STRATEGY

McNair & Company uses the information obtained in the Discovery Phase to conduct an analysis of six aspects of your financial profile: 1) Protection of Assets, 2) Savings of Assets, 3) Growth of Assets, 4) Transfer of Assets, 5) Cash Flow, and 6) Debt Structure. In analyzing these areas, McNair & Company often relies on the best available outside counsel in the fields of finance, legal and accounting so that it can ultimately provide you with a strategic direction that may help you realize your financial goals. Strategic direction, based on understanding and knowledge, sets the stage for success.

PHASE III – TACTICAL

McNair & Company defines the strategic direction recommended in the Assessment Phase by providing you with specific product options that support the general strategy. All products we recommend are issued by the highest-rated financial institutions and ideally have three features in common: 1) Tax-favored Accumulation and/or Distribution, 2) Flexibility and 3) Portability. Each product option is presented with a cost/benefit analysis enabling you to select the products you feel most comfortable purchasing. For public companies and associations, where board approval is necessary, McNair & Company provides tactical recommendations to all decision makers. Strategy is the blueprint; tactics are the bricks and

PHASE IV – IMPLEMENTATION

At this point, you choose the products and services you would like to add to your risk management, benefits and investment portfolio from the list of options provided in the Tactical Phase. McNair & Company will work closely with you and all of your other advisors execute all documentation and provide a detailed summary of all actions taken. By using MAPP™ as a planning and implementation tool, you can make confident decisions based on useful and credible information. McNair & Company is not a captive insurance or investment group – we represent clients, not insurance or investment companies. We will always give you several options from which to choose and let you be the master of your financial future. Confident and successful decisions are made when all options lead to exceptional results.