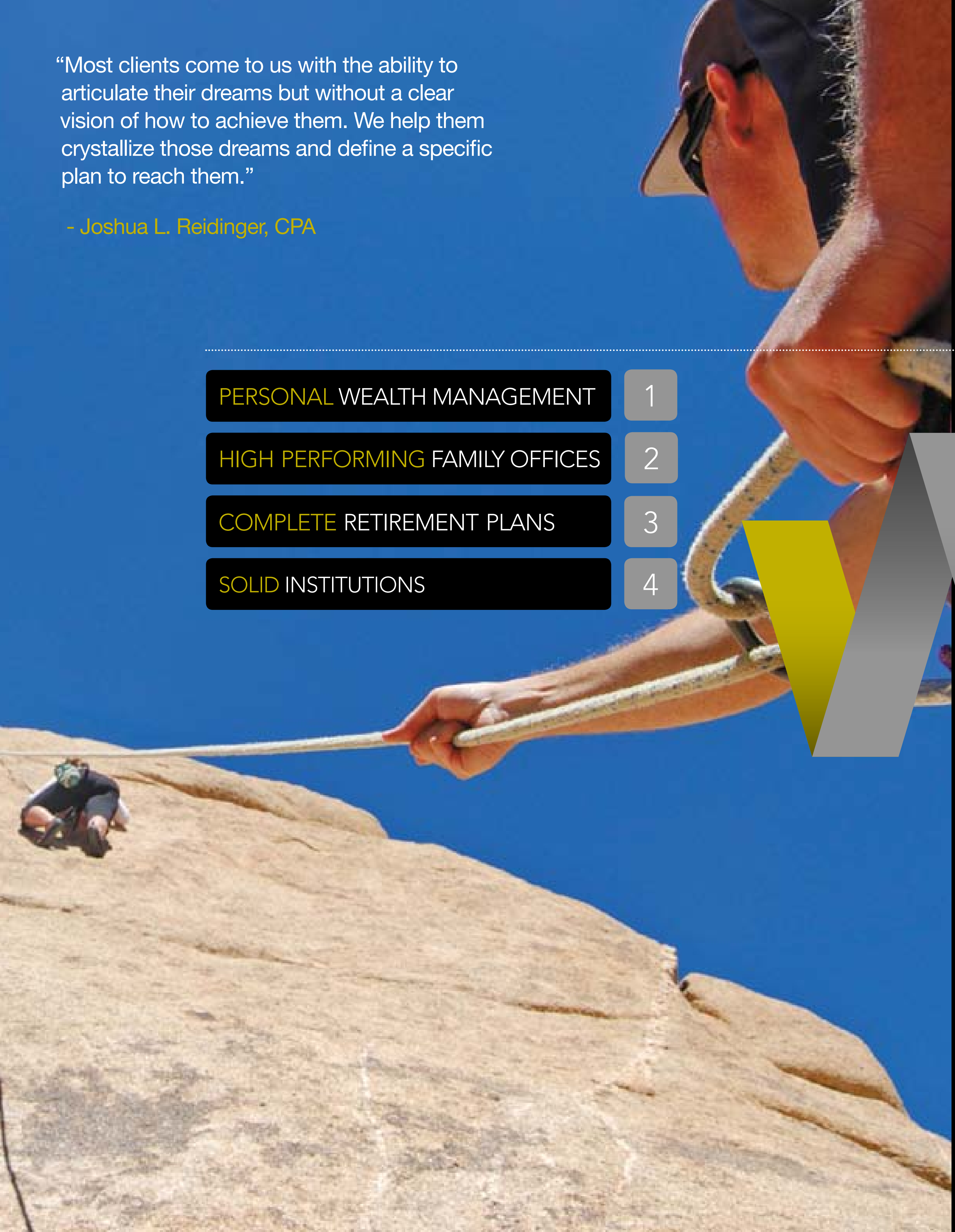
ASSET MANAGEMENT

LET'S THRIVE TOGETHER

"Most clients come to us with the ability to articulate their dreams but without a clear vision of how to achieve them. We help them crystallize those dreams and define a specific plan to reach them."

- Joshua L. Reidinger, CPA



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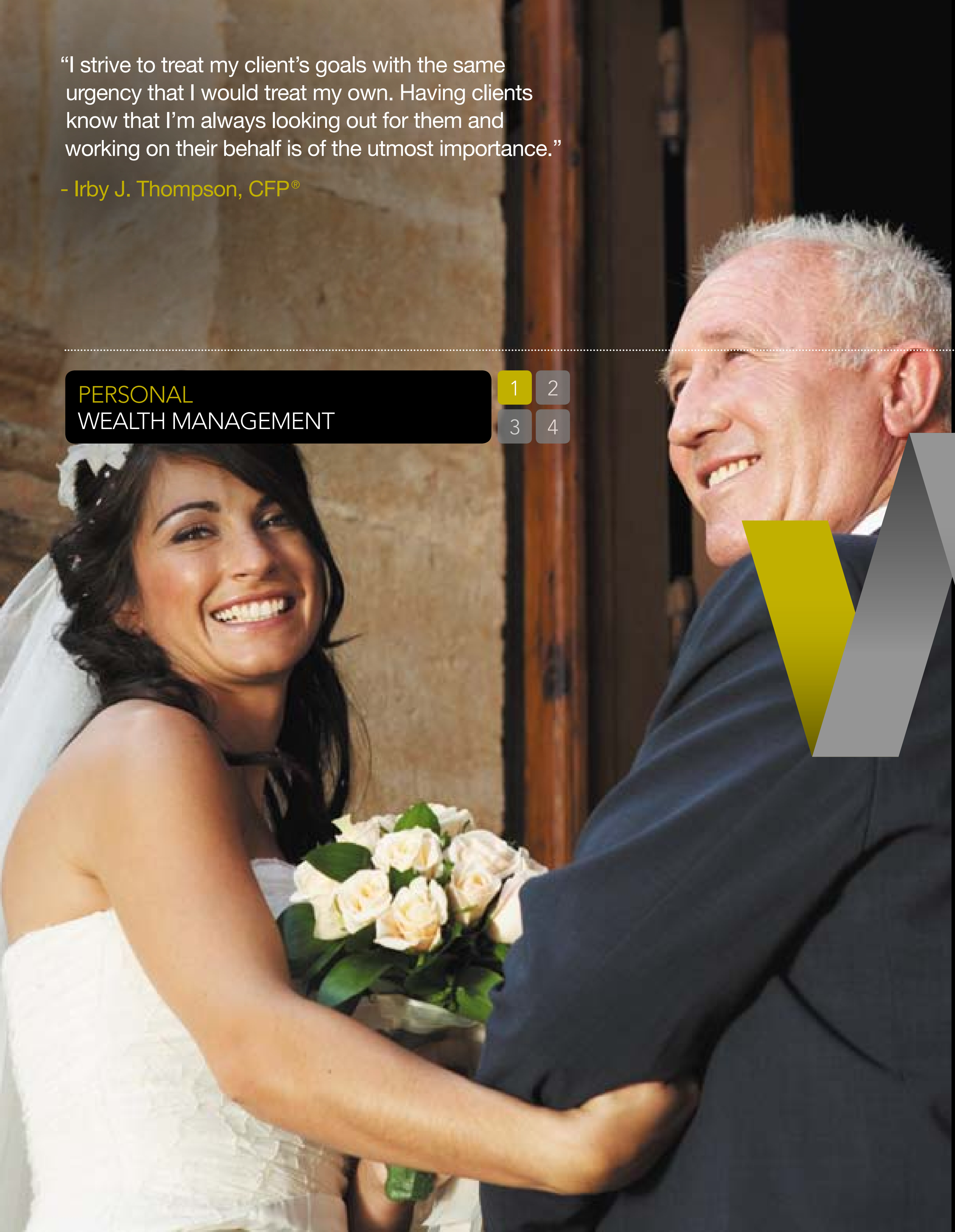
NO ONE WILL PULL HARDER FOR YOU.

Why not start at the top? Performance-driven organizations and individuals like you always look for an edge. You hold yourself to high standards and leverage the experience of professional advisors to accomplish more. Ultimately, you want advisors who will help you thrive. Welcome to Warren Averett Asset Management.

Let us get to know you and you'll experience a difference that works to your advantage. Count on independence – advisors operating free from quotas, fund restrictions and proprietary products. Count on discipline – a data-driven approach with in-depth research. Count on a better return on relationships – advisors whose passionate commitment to your success matches your own.

Independent registered investment advisor (RIA) – advising on assets in excess of $1.7 billion

Warren Averett
ASSET MANAGEMENT



"I strive to treat my client's goals with the same urgency that I would treat my own. Having clients know that I'm always looking out for them and working on their behalf is of the utmost importance."

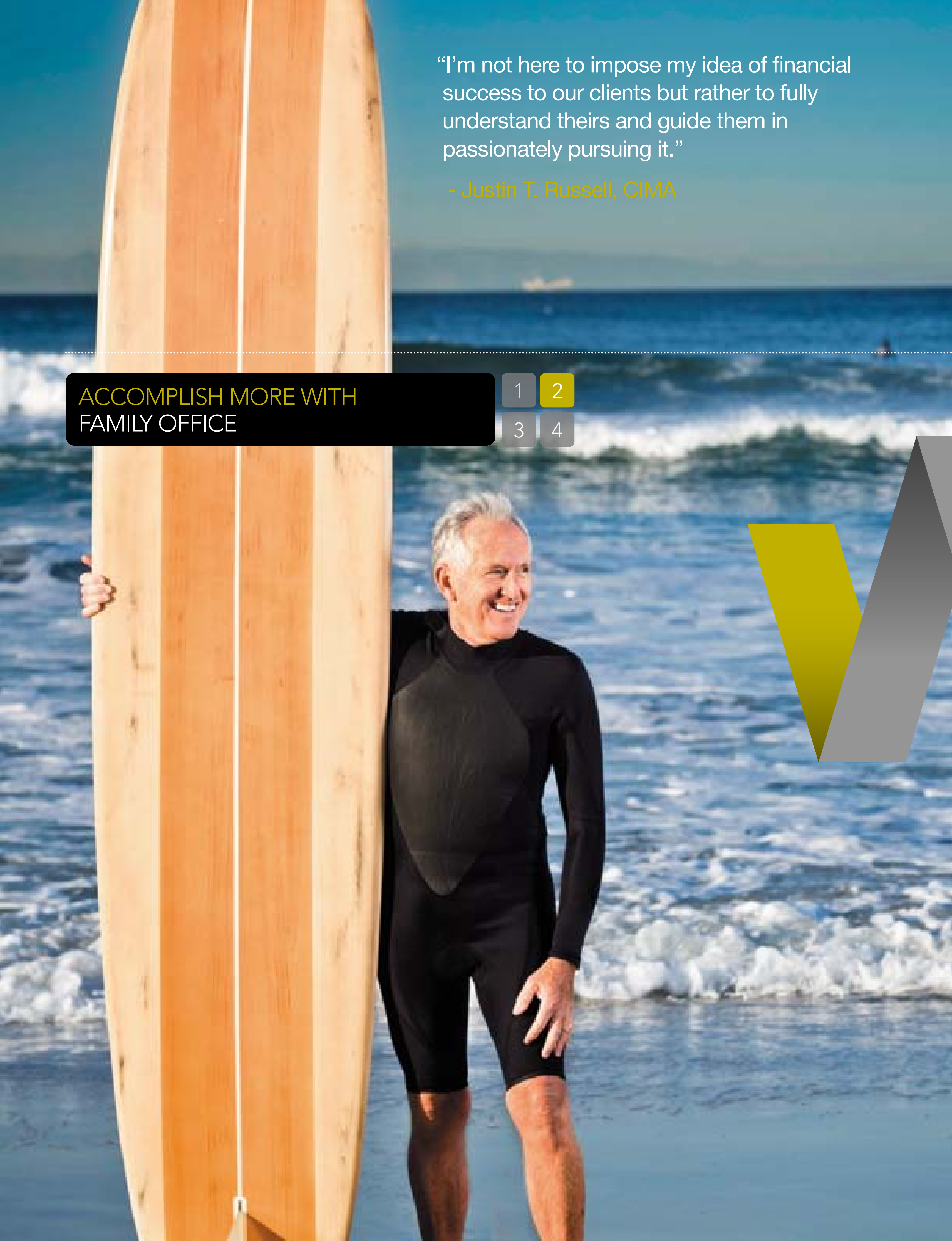
- Irby J. Thompson, CFP®

PERSONAL
WEALTH MANAGEMENT

WE LOVE IT WHEN A PLAN COMES TOGETHER.

Wealth management is more than just managing your investment portfolio. It's an alignment of personal, emotional and financial decisions that allow you to take care of the important things in life—like family, school, weddings, community, your home, travel, and other things you love. Our comprehensive approach for private clients blends investment management, tax, estate, and financial planning services. And yes, we do love it when your plans are realized.

Collaborative investment, tax, estate and financial planning services



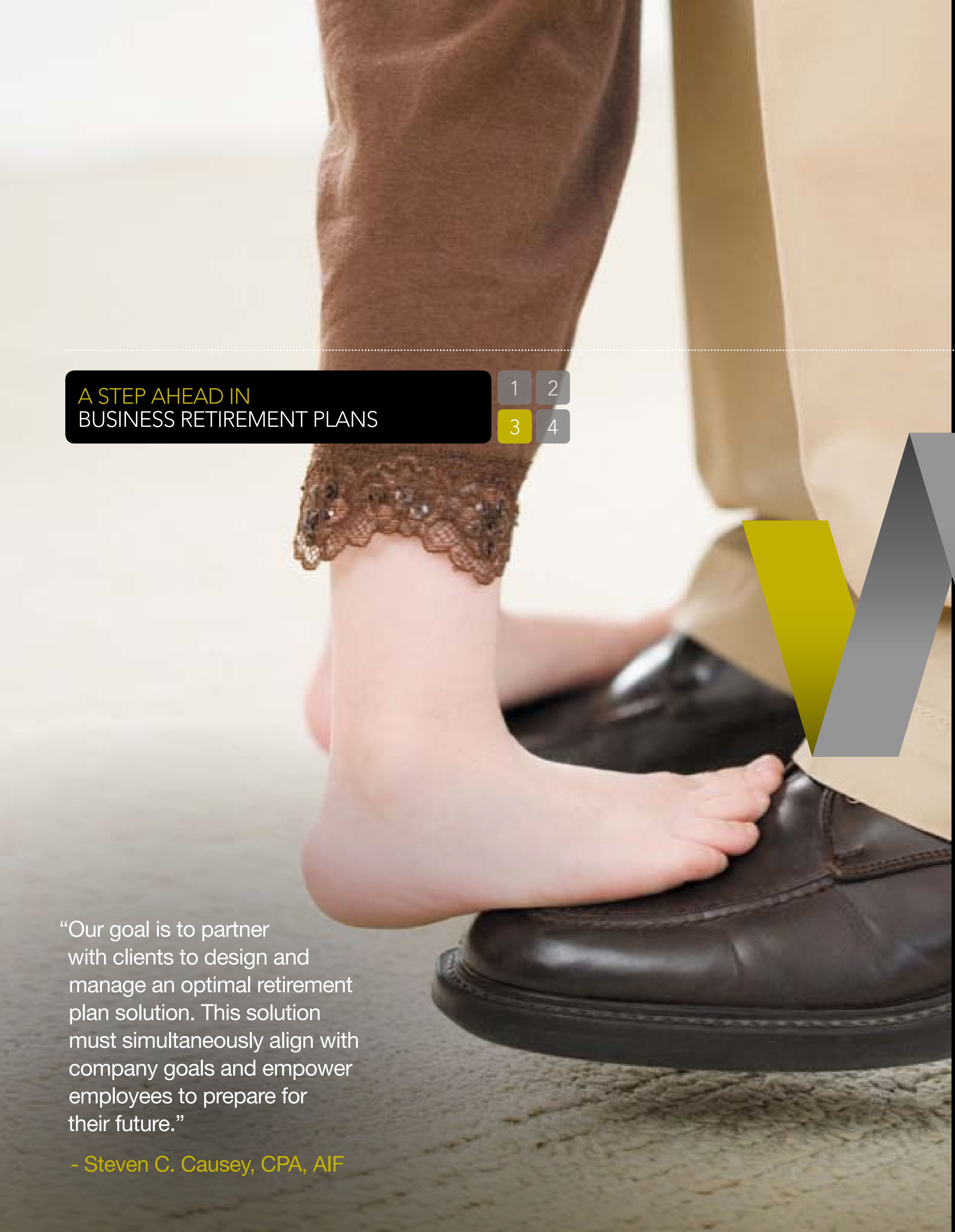
"I'm not here to impose my idea of financial success to our clients but rather to fully understand theirs and guide them in passionately pursuing it."

- Justin T. Russell, CIMA

AN OFFICE THAT GETS YOU OUT OF YOURS.

Warren Averett Family Office manages investments, estate planning and administration, real estate, staff and arrangements for you and your family. Coordinating your day-to-day accounting, payroll, taxes, bill payment, charitable giving and succession planning. The more we do for you, the more time you gain to pursue your passions and interests. And the less you have to worry about. Imagine that!

Team of 30+ with credentials including CPA, JD, CFA, CFP, CIMA, PFS, AIF and CRPC



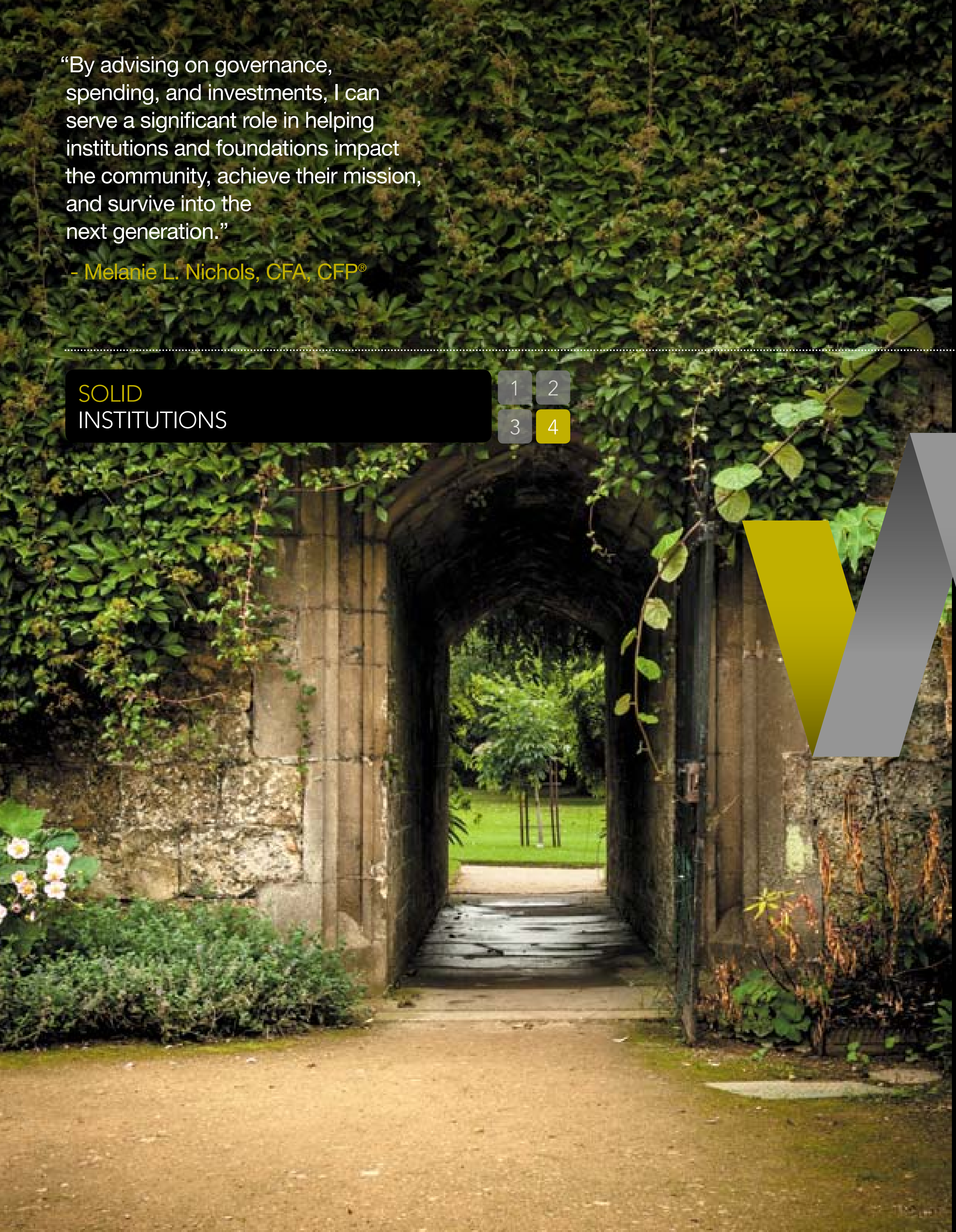
"Our goal is to partner with clients to design and manage an optimal retirement plan solution. This solution must simultaneously align with company goals and empower employees to prepare for their future."

- Steven C. Causey, CPA, AIF

MOVE TO A COMPLETE RETIREMENT PLAN SOLUTION.

Investment management and plan administration under one roof for your business and employees? Check. Regularly scheduled employee education and update meetings? Check. Annual Plan review meetings? Check. Our 401k Complete offering covers the spectrum of business retirement plan needs, including investment management, daily participant record keeping, plan administration, compliance testing, government reporting, employee education meetings, and annual formal plan reviews. The bottom line? Less administrative headaches and higher employee participation—all with a flexible and transparent fee structure.

Serving corporate retirement plans ranging from several to thousands of employees



"By advising on governance, spending, and investments, I can serve a significant role in helping institutions and foundations impact the community, achieve their mission, and survive into the next generation."

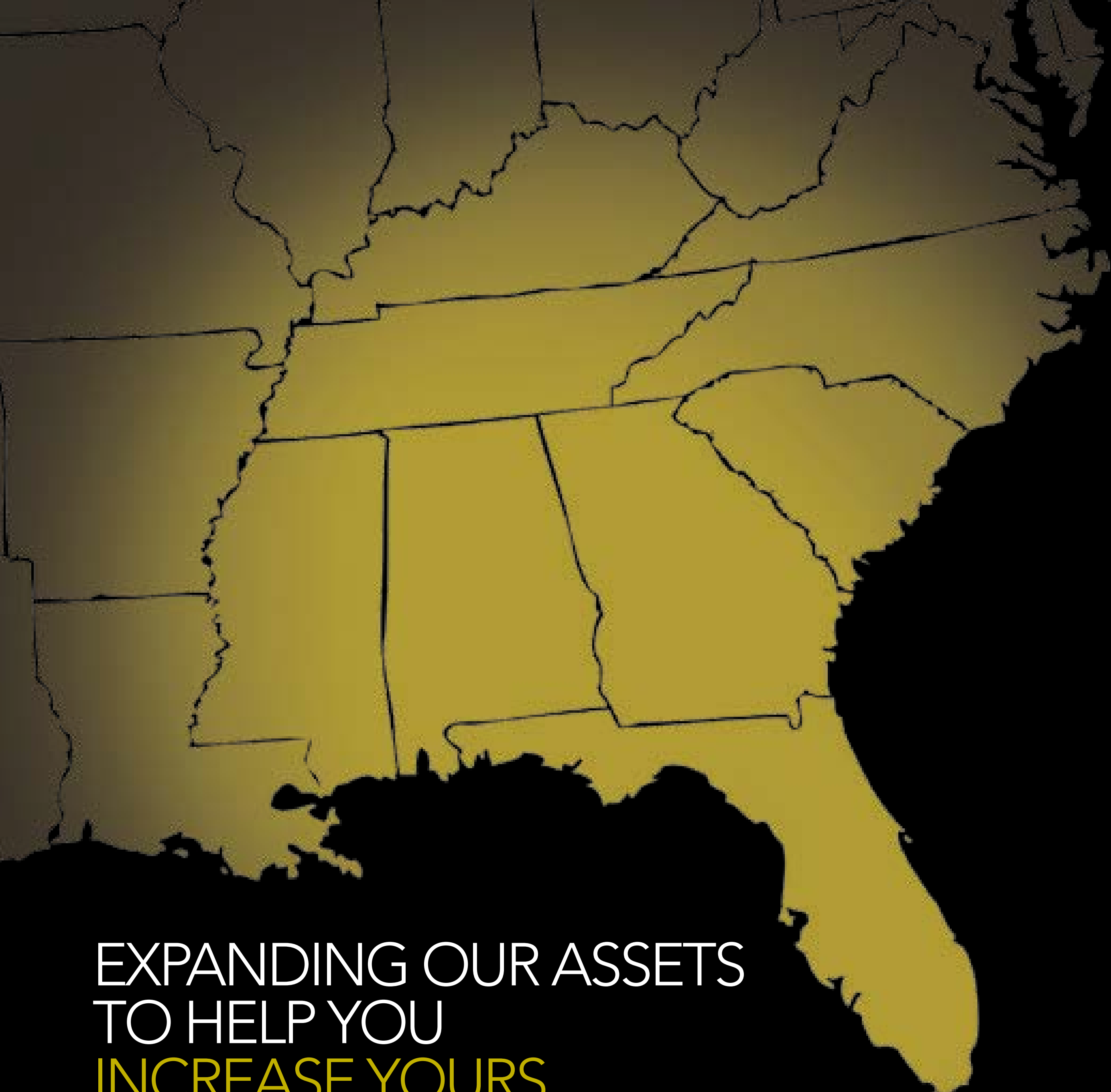
- Melanie L. Nichols, CFA, CFP®

SOLID
INSTITUTIONS

STRONGER INSTITUTIONS FROM THE GROUND UP.

The best academic institutions, religious foundations, or community grantmakers have a noble purpose, clear charter, passionate leadership, and a trusted advisor to ensure their ongoing strength. Expect us to provide you with a custom investment plan, board education, investment policy analysis, spending analysis and governance review, all while minimizing expenses and risks. We will make administration easier by assisting with check writing, director compensation issues and providing support for grant and unique filing requirements.

Institutional clients ranging from small family foundations to large board driven institutions



EXPANDING OUR ASSETS
TO HELP YOU
INCREASE YOURS.

Warren
Averett
ASSET MANAGEMENT

Learn more at www.WAasset.com