ABOUT RAYMOND JAMES

Registered Representatives at Dawson Wealth Management LLC offer securities through **Raymond James Financial Services, Inc.**

RJFS is a national financial services firm with more than 3,138 financial advisors located throughout the United States. The firm was founded in 1974 and is member of both the FINRA *(Financial Industry Regulatory Authority)* and SIPC *(Securities Investors Protection Corporation)*. The parent company of **RJFS** is **Raymond James Financial Inc.**, (New York Stock Exchange symbol **RJF)**, established in 1962 and a public company since 1983. Raymond James' subsidiaries provide a wide range of services to investors, including investment and financial planning; asset management; investment banking; and trust services. Their corporate headquarters are located in St. Petersburg, Florida. They have offices nationally and internationally.

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Dawson Wealth Management LLC *is a fee based financial solutions company established in 1985. We have an attorney on staff ready to assist you with your estate planning* needs. Various associates at BDF are members of the following professional organizations:*

- The Investment Management Consultants Association
- The Society of Financial Service Professionals
- The Financial Planning Association
- The National Association of Insurance and Financial Advisors

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**Estate planning services of DWM LLC are independent of Raymond James.*
***Ms. Chappell and the estate planning advice and services she offers are not affiliated with Raymond James. RJFS does not provide tax or legal advice. You should discuss any tax or legal matters with the appropriate professional.*

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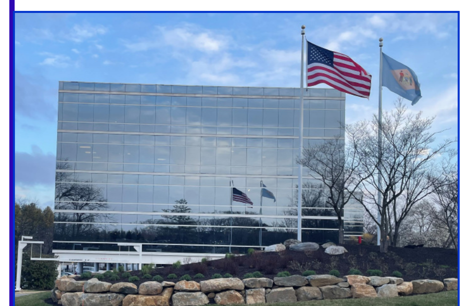

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Member FINRA/SIPC

Investment advisory services offered through Raymond James Financial Services Advisors, Inc.

ABOUT OUR COMPANY

Financial Planning is a process... At *Dawson Wealth Management LLC*, our advisors start the financial planning process with identifying and prioritizing your specific financial objectives. Together, we determine short- and long-term strategies that have the best potential for achieving your objectives. We can then either assist in the implementation of your plan or coordinate our efforts with other professionals of your choice. In either case, we review the progress you are making and periodically review and revise our recommended actions to provide you with a dynamic, up-to-date, and comprehensive plan designed to meet your unique needs. With over 100 years of combined experience in the financial services industry and a strong commitment to your success, the partners and staff at Dawson Wealth Management LLC are ready to provide you with the professional expertise and objectivity that will help invest, manage, and conserve your wealth. It is important to us that our clients are comfortable with each step of establishing their goals and implementing their financial plans. With this in mind, we have built our company with a philosophy of old fashioned service and satisfaction, striving to provide our clients with the highest level of service possible.

Visit us online at
www.dawsonwealth.com

OUR ADVISORS OFFER

Investment services:

- Stocks
- Bonds / CD's
- ETF's
- Sustainable Investing / ESG
- Mutual Funds
- 529 Plans
- Private Portfolio Management
- Asset Allocation

Securities offered through
Raymond James Financial Services, Inc.
Member FINRA/SIPC

Retirement planning:

- Date Selection
- Retirement Income Analysis
- Lump Sum Distribution Analysis
- Rollover Education
- Monte Carlo Simulation

-At DWM LLC you will enjoy independent unbiased service from advisors who are experienced credentialed professionals.

Tax management planning:

- Tax Planning
- Cash Management
- Executive Compensation
- Planning Including:
  Stock Option Analysis and/or Incentive Compensation
- Stock Concentration Diversification

Insurance services:

- Life Insurance
- Disability Insurance
- Annuities
- Long-Term Care Insurance
- Hybrid Policies

Estate planning*:

- Current Estate Analysis
- Wills and Trust Planning
- Minimize Taxes and Administrative Costs
- Living Wills
- Durable Power of Attorney

**Estate planning services of DWM LLC are independent of Raymond James.*

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