DAWSON WEALTH MANAGEMENT LLC

www.dawsonwealth.com

*Since 1985

Dawson Wealth Management LLC is not a registered broker/dealer and is independent of Raymond James Financial Services, Inc. member FINRA/SIPC.

38 YEARS

Of Serving Clients

1985 - 2023

DAWSON
WEALTH
MANAGEMENT LLC

OUR COMPANY

PRESENTED TO:

DWM LLC clients/prospective clients

Dawson Wealth Management LLC

1013 Centre Rd, Suite 228
Wilmington, DE 19805
302-757-8000
www.dawsonwealth.com

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

Dedicated To the Prudent Stewardship Of Our Clients' Wealth

OUR MISSION

What we do

Our mission is to help you achieve the goals you envision for your life by growing and preserving your wealth.

How we do it

Our approach is to always put your financial well-being at the front as we collaborate with you on a financial plan that encompasses all facets of your life. We put our clients' interests above our own and those of our firm.

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RAYMOND JAMES

THE RAYMOND JAMES ADVANTAGE

FOUNDED IN
St. Petersburg, FL
in 1962; public in 1983

BBB+
positive outlook
credit rating S&P*

MORE THAN 2x
required total capital ratio

8,200
financial advisors

$1.02 trillion
in client assets

A spirit of independence.
A focus on financial well-being.

When Bob James founded Raymond James in 1962, he did so based on a belief that clients deserved more than help with investment decisions – they needed advice that considered their entire financial picture.

As a result, Raymond James has always been a different kind of firm. One that embraces long-term planning, methodical decision-making and remains focused on what matters most: you, the client.

That approach has continually supported our growth as a preeminent financial firm serving clients across North America and overseas. Further, the company has expanded through the years to serve corporations, institutions and municipalities through significant capital markets, banking and asset management services.

More than 58 years later, Raymond James has upheld a reputation of strength and stability through every kind of market environment.

As of 12/31/2020. Past performance is not an indication of future results. The information provided is for informational purposes only and is not a solicitation to buy or sell Raymond James Financial stock. A credit rating of a security is not a recommendation to buy, sell or hold securities and may be subject to review, revisions, suspension, reduction or withdrawal at any time by the assigning rating agency.

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RAYMOND JAMES

RAYMOND JAMES VALUES

Markets change, but our values remain the same

We put clients first

If we do what's right for clients, the firm will do well and we'll all benefit.

We act with integrity

We put others above self, and what's right above what's easy. We believe doing well and doing good aren't mutually exclusive.

We value independence

We respect autonomy, celebrate individuality and welcome diverse perspectives, while encouraging collaboration and innovation.

We think long term

We act responsibly, taking a conservative approach that translates into a strong and stable firm for clients, advisors, associates and shareholders.

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A HISTORY OF STRENGTH AND STABILITY

1962
Bob James founds Robert A. James Investments.

1964
Robert A. James Investments merges with Raymond and Associates. First branch office opens.

1970
Tom James is named CEO.

1973
Raymond James takes a seat on the New York Stock Exchange.

1983
Raymond James completes $14 million IPO.

1990
Raymond James' commitment to client service formalizes under the name Service 1st.

1994
Raymond James publishes the first Client Bill of Rights.

2008
J.D. Power and Associates ranks Raymond James highest in both investor satisfaction and employee advisor satisfaction.[1,2]

2010
Paul C. Reilly succeeds Tom James as CEO.

2016
The firm acquires the U.S. private client unit of Deutsche Asset and Wealth Management and revives the storied Alex. Brown brand.

[1] Raymond James received the highest numerical score among full service brokerage firms in the proprietary J.D. Power and Associates 2008 Full Service Investor Satisfaction Study^{SM}. Study based on responses from 4,528 investors measuring 19 investment firms and measures opinions of investors who used full-service investment institutions. Proprietary study results are based on experiences and perceptions of consumers surveyed in April-May 2008. Your experiences may vary. Visit jdpower.com.

[2] Raymond James received the highest numerical score for employee advisor satisfaction among financial investment firms in the proprietary J.D. Power and Associates 2008 Financial Advisor Satisfaction Study^{SM}. Study based on 3,124 total responses measuring 19 investment firms and measures employee satisfaction of investment firms. Proprietary study results are based on experiences and perceptions of consumers surveyed in May-June 2008. Your experiences may vary. Visit jdpower.com.

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STRENGTH, STABILITY AND ACCOUNT PROTECTION

Committed to high-caliber support and protection

Our strength and stability extend to keeping our clients' accounts secure as well. That's why we offer protection through excess **Securities Investor Protection Corporation (SIPC) coverage**, designed to safeguard your cash and securities. Additionally, all accounts held at Raymond James Bank are insured by the **Federal Deposit Insurance Corporation (FDIC)** for up to $250,000 per depositor.

You can also rely on our more than 1,000 associates dedicated to preserving your privacy through technology and security management. Protecting you and your privacy is one of our highest priorities and one that continuously guides how we do business.

Some of the cybersecurity safeguards we employ include:

- A dedicated cyber threat center
- Vulnerability testing of our networks and servers
- Encryption, secure virtual private networks and the latest firewall and antivirus technology
- Redundant systems and off-site data storage providing protection in the event of emergency or natural disaster

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A DIFFERENT KIND OF FIRM

LIFE WELL PLANNED.

For us, life well planned is more than a motto. It's our purpose and our promise. It's the goal that drives us to help clients prepare for major financial milestones and each moment in between. We focus on tailored financial advice designed to enhance your life – to allow more time for the people, causes and activities that make life worth living.

As we help you prepare for the future you've always wanted, we'll work together to identify and prioritize your goals and devise a plan to help reach them. We provide a wide range of solutions by leveraging the firm's extensive resources and the expertise of Raymond James professionals, while collaborating with your existing legal and tax relationships for a cohesive approach.

Offering:

- Tailored advice
- Extensive resources
- Comprehensive wealth management

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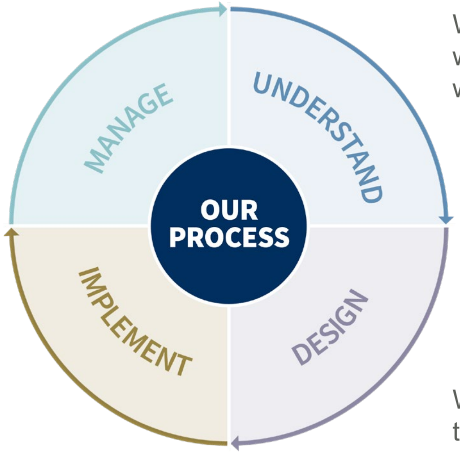
RAYMOND JAMES

OUR PROCESS

These time-tested steps help us build a financial plan personalized to you.

We'll review the progress of your plan to make sure it stays on track, and suggest any changes where needed.

We'll build an understanding of where you are today and what you want to accomplish in the future.



With your approval, we'll implement your plan, select the specific investments and handle all the paperwork.

We'll analyze what you've shared with us to design your plan, then present it to you and answer any questions you may have.

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RAYMOND JAMES

SERVICES FOR EVERY PART OF LIFE

Comprehensive and customizable offerings

We'll provide you with the client-first service our company was founded on, paired with the resources and support only an international financial services firm can deliver.

- Asset Management
- Business Succession Planning
- Cash Solutions
- Lending Solutions (offered through Raymond James Bank)*
- Charitable Giving & Gifting Strategies
- Corporate Benefits Planning
- Education Planning
- Estate Planning & Trust Services (offered through Raymond James Trust)**
- Fixed Income Services
- Insurance & Risk Management
- Integrated Wealth Management
- Longevity Planning
- Retirement Planning
- Tax Planning

*Raymond James & Associates, Inc., Raymond James Financial Services, Inc. and your Raymond James financial advisor do not solicit or offer residential mortgage products and are unable to accept any residential mortgage loan applications or to offer or negotiate terms of any such loan. You will be put into contact with an employee of our affiliate, Raymond James Bank, for your residential mortgage needs.

**Trust Services provided by our affiliate, Raymond James Trust.

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ASSET MANAGEMENT

An array of investment strategies that align with your goals

Your financial goals are unique – your plan to pursue them should be as well. That's why we review a multitude of investment strategies, managers and products, identifying those that fit your financial goals, taking into consideration their potential for growth, capital preservation, income and other factors specific to your situation.

- Alternative Investments
- Annuities & Insurance
- Concentrated Equity Strategies
- Equity & Fixed Income Strategies
- Exchange-Traded Funds
- Mutual Funds
- Options
- Separately Managed Accounts
- Structured Investments
- Unified Managed Accounts
- Wrap Accounts
- 529 Plans

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BUSINESS SUCCESSION PLANNING

Custom solutions for business owners

A business succession plan helps you address and resolve many important considerations. Should you transfer ownership to family members or employees or perhaps an outside party? Shouldn't you have an orderly plan in place in the event of an incapacitating health event or death? How can you pull money out of the business in a tax-efficient manner?

We can help you answer these important questions and smooth the transition by building a sound business succession plan. To help you grow, safeguard and ultimately transfer your greatest asset, we offer:

- Business succession planning
- Business sales and valuations
- Retirement plans
- Risk management
- Investment banking services, including mergers and acquisitions and public offerings

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RAYMOND JAMES

LENDING SOLUTIONS

Lending products designed to meet your needs

We offer specialized recommendations and personalized guidance to help navigate near-term expenses, without disrupting your long-term financial plan.

- **Securities Backed Options**
  - Securities Based Line of Credit
  - Structured Lending

  Through Raymond James Bank, borrow against eligible assets for an alternative source of liquidity.

Loan proceeds may be used for:

- Acting on a real estate investment
- Purchasing a vacation home
- Expanding a home (or adding to a home)
- Purchasing a private company
- Fine art, boat or other luxury purchase
- Supporting a large tax bill
- Supporting a business

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LENDING SOLUTIONS (CONT.)

- **Margin Account**

  Raymond James offers fast, easy, flexible access to cash for short-term borrowing needs.

- **Mortgage Solutions**

  Residential financing options in all 50 states through Raymond James Bank, as well as commercial real estate lending.

  - Fixed Rate
  - Adjustable Rate
  - Interest-Only
  - Pledged Securities Mortgage
  - Construction Lending
  - Private Wealth Mortgage Channel

Products, terms, and conditions subject to change. Subject to standard credit criteria. A line of credit backed by securities, such as a securities based line of credit or a structured line of credit, may not be suitable for all clients. A line of credit backed by securities, such as a securities based line of credit or a structured line of credit, may not be suitable for all clients. The proceeds from a line of credit backed by securities cannot be (a) used to purchase or carry securities; (b) deposited into a Raymond James investment or trust account; (c) used to purchase any product issued or brokered through an affiliate of Raymond James, including insurance; or (d) otherwise used for the benefit of, or transferred to, an affiliate of Raymond James. Raymond James Bank does not accept RJF stock or any securities issued by affiliates of Raymond James Financial as pledged securities towards a line of credit. Borrowing on securities based lending products and using securities as collateral may involve a high degree of risk including unintended tax consequences and the possible need to sell your holdings, which may lead to a significant impact on long-term investment goals. Market conditions can magnify any potential for loss. If the market turns against the client, he or she may be required to quickly deposit additional securities and/or cash in the account(s) or pay down the loan to avoid liquidation. The securities in the Pledged Account(s) may be sold to meet the Collateral Call, and the firm may sell the client's securities without contacting them. A client may not be entitled to choose which securities or other assets in his or her account are liquidated or sold to meet a Collateral Call. In many cases, the firm may increase its maintenance requirements at any time and is not required to provide a client advance written notice. A client may not be entitled to an extension of time on a Collateral Call. Increased interest rates could also affect LIBOR rates (or any successor rate thereto) that apply to your line of credit causing the cost of the credit line to increase significantly. The interest rates charged are determined by (i) the market value of pledged assets and the net value of the client's non-pledged Capital Access account or (ii) the line of credit amount. Lines of credit are provided by Raymond James Bank. Raymond James & Associates, Inc. and Raymond James Financial Services, Inc. are affiliated with Raymond James Bank, a federally chartered national bank.

Property insurance is required. Flood insurance is required if property is in a designated flood zone of 'A' or 'V.'
Raymond James & Associates, Inc. and Raymond James Financial Advisors do not solicit or offer residential mortgage products and are unable to accept any residential mortgage loan applications or to offer or negotiate terms of any such loan. Please refer to a qualified Raymond James Bank employee for your clients' residential mortgage lending needs.

CASH SOLUTIONS

Manage your cash your way

Integrated cash solutions designed to simplify and enhance your financial life.

- **Convenient Cash Management with Capital Access**
  - Visa® Platinum debit card
  - Unlimited check writing
  - Overdraft protection
  - Mobile check deposit and mobile wallet
  - Direct deposit
  - 24/7 online access and client support

- **Make Your Money Work For You**
  - Multi-bank insured deposit program
  - Retail and government money market funds

- **Important Cash Protection**
  - Up to $3MM ($6MM for joint accounts) in FDIC insurance protection

All funds held at Raymond James Bank and participating banks in the Bank Deposit Program are insured by the Federal Deposit Insurance Company (FDIC) up to $250,000 per depositor, per insured bank, for each account ownership category. Additional information can be found at fdic.gov or by calling 877.ASK.FDIC (877.275.3342).

Raymond James & Associates, Inc. and Raymond James Financial Services, Inc. are affiliated with Raymond James Bank, National Association (N.A.). Unless otherwise specified, products purchased from or held at Raymond James & Associates or Raymond James Financial Services are not insured by the FDIC, are not deposits or other obligations of Raymond James Bank, N.A., are not guaranteed by Raymond James Bank, N.A., and are subject to investment risks, including possible loss of the principal invested.

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RAYMOND JAMES

CHARITABLE GIVING

A thoughtful approach to philanthropy

While many individuals give to charity, few take the time to create a well-designed charitable strategy that considers personal tax benefits and control over your investments. We can assist with strategies such as:

- Donor Advised Funds
- Charitable Remainder Trusts
- Charitable Lead Trusts
- Pooled Income Funds
- Charitable Gift Annuities
- Private Family Foundations

A popular giving option: Donor Advised Funds

Similar to a private foundation, a donor advised fund provides an immediate full tax benefit and lets you donate to your favorite charities, with less expense and setup.

Donors are urged to consult their attorneys, accountants or tax advisors with respect to questions relating to the deductibility of various types of contributions to a Donor-Advised Fund for federal and state tax purposes.

To learn more about the potential risks and benefits of Donor Advised Funds, please contact us.

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CORPORATE BENEFITS PLANNING

Tailored solutions for the C-suite

We can help you maximize your corporate benefits through stock option planning, hedging and monetization for concentrated equity positions, and more.

- Concentrated equity strategies
- Executive transactions
- ESOPs
- Cashless stock option exercises
- Rule 144 executions
- 10b5-1 sales plans
- Corporate benefits planning

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EDUCATION PLANNING

Funding higher education for generations to come

Investing in education, whether for one's family or others, is an investment in someone's future.

For many of our clients, this is a fundamental philosophy and responsibility.

We help our clients have a meaningful impact on generations to come by:

- Identifying tax-efficient options, including 529s and Coverdell Education Savings Accounts
- Delineating who controls the funds
- Determining risk tolerance in investments
- Reviewing all factors in funding education for future generations

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ESTATE PLANNING & TRUSTS

A plan for a lasting legacy

Having an estate plan to control the distribution of your assets benefits everyone – you, your family and the causes you care about – and can help mitigate potential pitfalls in the future.

Our experienced team has the resources to assist your attorney and CPA with a personalized plan that not only protects your assets but also helps you share your wealth with the people and charities you care about most.

We can also provide estate planning analysis. With the resources of our affiliate Raymond James Trust, N.A. at our disposal, we can assist clients in the trust planning process and leverage the expertise of a professional fiduciary.

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FIXED INCOME

Building a foundation

Fixed income investments are an essential component of a well-diversified financial plan and can support your aspirations with a reliable stream of income.

With a deep understanding of bonds and fixed income investments, we can help you integrate these core investments into your custom financial plan using a process that is defined, focused and disciplined. We offer a broad range of true fixed income investments at competitive pricing, offered in competition by more than 100 dealers across alternate trading platforms.

- U.S. Treasuries
- Agency and government-sponsored enterprise bonds
- Brokered certificates of deposit
- Corporate bonds
- Mortgage-backed securities
- Municipal bonds
- Preferred securities

Bond prices and yields are subject to change based upon market conditions and availability. If bonds are sold prior to maturity, you may receive more or less than your initial investment. There is an inverse relationship between interest rate movements and fixed income prices. Generally, when interest rates rise, fixed income prices fall and when interest rates fall, fixed income prices rise.

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INSURANCE & RISK MANAGEMENT

Helping you prepare for the unexpected

We believe a comprehensive financial plan must consider and prepare for the unexpected – such as accidents, illnesses and disability. Our team helps you think ahead and consider different scenarios, then prepare contingency plans to address them. We understand that while risk cannot be eliminated, it can and should be mitigated. We offer:

- Access to more insurance carriers than others
- Life, long-term care, disability income insurance and more
- Wide variety of annuity products
- Specialized, strong technical knowledge

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INTEGRATED WEALTH MANAGEMENT

Success starts with planning

Whether planning to build a home by the lake or help your daughter launch a business, you need a well-conceived plan in order to succeed. Pursuing financial independence is no different. Whether you're looking to grow your money over time, generate income in retirement or preserve wealth for future generations, confidence in your financial plan comes with knowing your assets are invested well. As your knowledgeable partner, we provide wide-ranging, comprehensive financial planning with which to chart a detailed course for pursuing a bright and secure future. We can help you:

- Build a foundation with realistic goals
- Develop a comprehensive financial picture
- Monitor and optimize performance

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LONGEVITY PLANNING

Beyond retirement

As we all live longer lives, there’s a lot to consider about your retirement years – from choosing the right Medicare plan to the possibility of a healthcare episode to finding a ride to the grocery store. Raymond James has partnered with several services to help make these challenges easier for you and your loved ones.

As an experienced advisor in longevity planning, we are proactive when it comes to your interests. We’ll help you make informed decisions to safeguard your physical as well as financial well-being.

RETIREMENT PLANNING

Transitioning to retirement

Retirement means something different for everyone. Regardless of how you picture it, we can facilitate the preservation and transfer of wealth, as well as help you hammer out the details of the next phase of your life.

We'll create a plan designed to enable you to:

- Maintain your lifestyle
- Minimize your tax burden when you draw down your retirement savings
- Navigate through the intricacies of Social Security and Medicare
- Enjoy a retirement that is unencumbered by financial concerns and uncertainty

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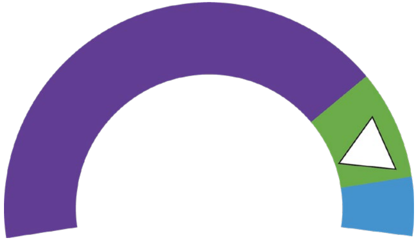
RETIREMENT: GOAL PLANNING & MONITORING



Pursuing your goals

Retirement is all about making good decisions. This is a great time to identify and record your goals.

There are a lot of decisions and trade-offs facing you as you consider your next phase of life.

- What are your goals for retirement, how much income will you need, what do you want to do with your money and your time?
- What benefits can you expect?
- What about your health?

We have the tools and resources to ensure that you understand your choices and how they can impact your confidence in retirement.

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TAX PLANNING

Making the most of what you have

It is important to consider whether to place assets in a taxable or tax-deferred account. After all, what you actually keep after taxes is what matters. We take a tax-sensitive approach to financial planning and work with your accountant or tax attorneys to help mitigate the impact of taxes.

We have access to a broad array of investments, including some that are tax-exempt or especially tax-efficient when it comes to providing yield and predictable cash flow to support your desired lifestyle.

Changes in tax laws or regulations may occur at any time and financial advisors of Raymond James are not qualified to render advice on tax or legal matters. You should discuss any tax or legal matters with the appropriate professional.

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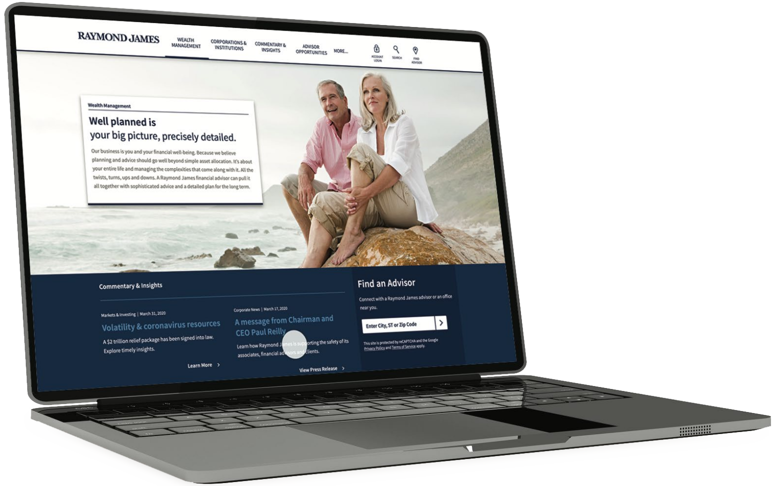
A PERSONALIZED CLIENT EXPERIENCE



Keeping you informed on financial matters

Knowledge is power. That’s why we equip you with communication on everything from investing and planning education to market updates, award-winning equity research and forward-looking commentary via our website, personal finance publications and periodic reviews. Also, through our online client portal, Client Access, you’ll have easy, secure access to your account information all in one place.

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CONVENIENT ACCOUNT ACCESS

Technology designed to make life easier

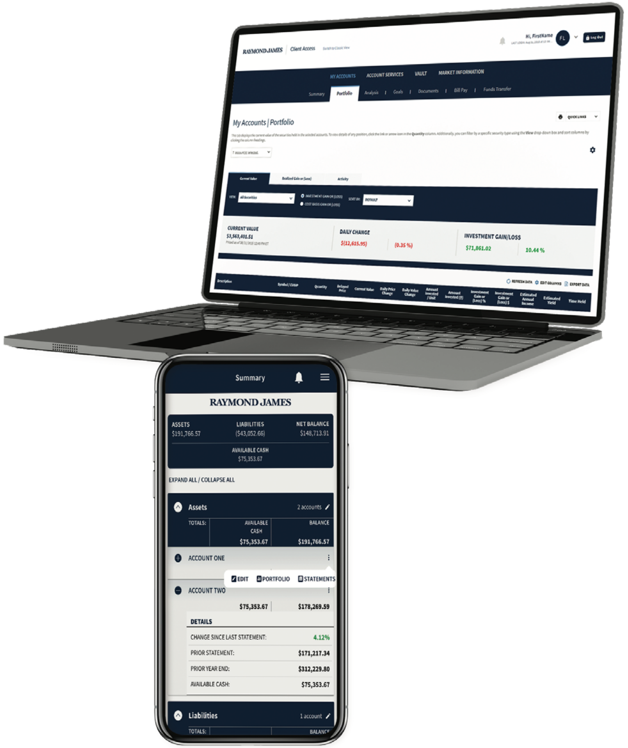
The information you need on all your accounts is right at your fingertips with Client Access, our online portal.

COMPREHENSIVE Client Access brings your day-to-day finances and long-term investments together in one place, giving you a holistic view from any computer or mobile device.

CONVENIENT Tap into your account information securely from virtually anywhere. Transfer funds, use mobile check deposit or mobile bill pay features, and view statements.

SECURE Advanced security features keep your critical data safe, including firewalls and encryption technology, two-factor authentication, and fingerprint and facial recognition at login.

COLLABORATIVE Interactive tools, including the Vault, offer another layer of connection with your finances and with your advisor.



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INVESTOR INSIGHTS

Providing tailored communications

WorthWhile magazine

A publication of thoughtful insight dedicated to the life well planned, covering investments, the markets, art, philanthropy and more

Newsletters on focused topics

Articles on a variety of personal finance topics – everything from retirement to taking your business to the next level

Investment Strategy Quarterly

Members of the Raymond James Investment Strategy Committee share their views on the markets, the economy and key themes impacting investors

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RAYMOND JAMES

PARTNERING WITH US

Here and ready to help

You can expect more – much more – from a highly skilled team backed by the resources of a premier investment firm. We can help you create a solid financial plan that reflects where you are and where you want to go in life.

Let us know when you're ready to begin, and we'll take the next step together toward the future you envision.

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RAYMOND JAMES

RAYMOND JAMES®

INTERNATIONAL HEADQUARTERS: THE RAYMOND JAMES FINANCIAL CENTER

880 CARILLON PARKWAY // ST. PETERSBURG, FL 33716 // 800.248.8863

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