THE FOWLER GROUP of RAYMOND JAMES®

Who We Are:

We are a full-service team of investment professionals dedicated to helping both organizations and their employees. We have experience in the retirement plan provider field, with in-depth knowledge of plan design, pricing and operations.

What We Do:

Our unique retirement plan capabilities can assist any organization. Below are a few of the programs and tools we implement for our clients:

- Periodic, structured market reviews of pricing, participation and plan design
- Investment policy creation to outline the fund monitoring and replacement process
- Utilization of a nationally recognized 3rd party fiduciary investment monitoring program
- Servicing policy statement to clearly define roles and responsibilities of all parties
- Measurable education campaigns for both enrolled and eligible employees
- Comprehensive financial and retirement planning for employees

Why We Do It:

Employees need help now more than ever to understand their 401(k), which will ultimately make up the majority of their savings in retirement. We would welcome an opportunity to serve their needs.

Who We Work With:

- CFO, CEO, HR Director, Benefits/Payroll Director
- Typical client size 30-500 employees
- Growing organizations
- Leadership changes

Questions to Ask:

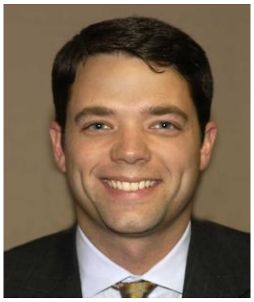
- What do you like most about your 401(k) plan? What would you change?
- What feedback do you get from your employees about the 401(k) plan?
- Who do your employees go to for guidance on their investments?
- Given all the press I see about 401(k) plans, have you conducted a full-scale review lately?

There are very few financial advisors in this market that specialize in this arena. At a minimum, a brief discussion would highlight a few ways the organization could strengthen the existing 401(k) plan.

1033 Demonbreun Street, Ste. 500 // Nashville, TN 37203
T 615.645.6717 // F 615.645.6770
www.fowlerwealthmanagement.com

THE FOWLER GROUP of RAYMOND JAMES®

Meet Our Team:



R. Andrew Fowler, AIF®, AWMA®
Senior Vice President, Investments | Managing Director

Andrew began his career as a Financial Advisor at Morgan Keegan in 2002, which is now Raymond James through a merger of the two companies in 2013. As the senior partner on the team, Andrew acts as a wealth management consultant with a primary focus on goals-based investing. He provides cohesive vision to help ensure client needs, wants and wishes are met with as much certainty and as little risk as possible.

Andrew.Fowler@RaymondJames.com // T 615.645.6715

Chris R. Boyd, CRPS®, AAMS®
Chartered Retirement Plans Specialist^{SM} | Financial Advisor

After spending almost 10 years at ING honing his expertise with retirement plan providers, he found that it's the financial advisors who have the deepest relationships with clients and are best positioned to make lasting, positive change to the retirement plans they serve. So, in 2014, Chris joined The Fowler Group at Raymond James as a financial advisor, specializing in retirement plan consulting for corporate and nonprofit retirement plans including 401(k) and 403(b) plans.

Chris.Boyd@RaymondJames.com // T 615.645.6717

Nicole McLeod, CFP®, AIF®
Certified Financial Planner^{TM} | Financial Advisor

Nicole began her career in the financial services industry at Morgan Keegan in 2007, and then partnered with Andrew in 2011 to create The Fowler Group. The team became a part of Raymond James through a merger of the two companies in 2013. As a financial planner, Nicole creates, implements and monitors our clients' financial plans. She strives to help clients achieve their financial, personal, professional and philanthropic goals during their lifetime.

Nicole.McLeod@RaymondJames.com // T 615.645.6716

1033 Demonbreun Street, Ste. 500 // Nashville, TN 37203
T 615.645.6717 // F 615.645.6770
www.fowlerwealthmanagement.com