Comprehensive | Tactical | Risk Managed

ARKĀGOS
ADVISORS

Building Your Financial Future Together

Planning With Experience

Paula Pass is CEO and President of Arkāgos Advisors, Inc., and she is a Certified Financial Professional (CFP®). She founded Arkāgos on the principle of helping people, not pushing product. By delivering straightforward financial advice instead of selling investment products, Paula is able to give undivided loyalty to her clients. Her mission is to provide transparent, goal-oriented financial planning as well as asset management services that serve the needs of her clients first.

Paula's unique philosophy and extensive experience allow her to provide customized counsel to women who are seeking sound financial guidance without the hassle of being sold on specific financial products. Through her various associations and memberships in Alexandria, VA and Washington, D.C., she is committed to helping all women achieve financial confidence.

Paula's CFP® designation means she has an excellent command of numerous integrated financial planning topics, including:

- Investment Planning
- Tax Planning
- Retirement Planning
- Estate Planning
- Insurance Planning
- Financial Management

It also means she is held to the highest code of ethics when it comes to her professional and ehtical responsibilites to her clients.

Paula received her bachelor's degree in political science with an emphasis on economics from the University of Georgia, and completed her Financial Planning Capstone Course at Georgetown University, School of Continuing Education. She gained her Six Sigma certification through Emory University.

Meeting Today's Unique Financial Demands

The burden of individual financial management has never been more complex than it is today. The days of staying in one job for 30 years with a healthy pension waiting for you at retirement are disappearing rapidly. Over the past decade, there has been a dramatic shift in who takes responsibility for your financial well being, as companies are placing the burden of financial planning over to their employees through self-managed 401(k) plans.

This is just one of the many trends that make establishing a well-informed financial plan so challenging in today's world. You can add to that constant changes in tax laws, health care insurance, an always changing governemental landscape with uncertain futures for Social Security and Medicare, and volatile economic markets.

To combat all these variables, you now have to take on the daunting task of becoming a financial planner, requiring expertise in countless financial scenarios, including:

- Preparing for Retirement
- New Tax Laws
- Estate Planning
- Long-Term Care
- Insurance Ramifications
- Women in Transition

It can become a very long, complicated list. By partnering with an experienced CFP® advisor, Arkāgos clients have the opportunity to create an investment approach that emphasizes risk-managed portfolios designed to meet the specific needs and timelines associated with your financial goals.

We believe our philosophy reflects what many of today's investors are seeking—a steady approach to generating returns while carefully navigating life's turbulence. We would look forward to collaborating with you to help build your financial future.

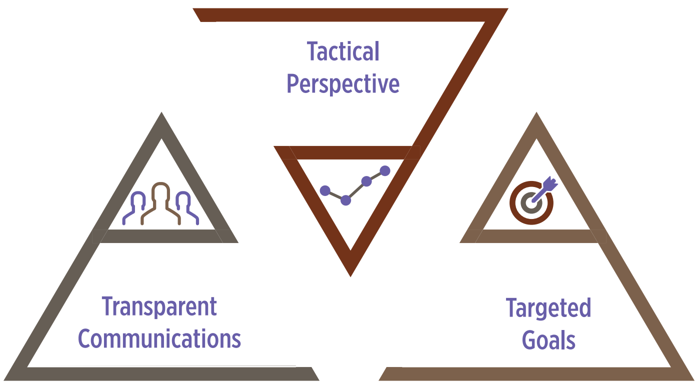
www.arkagosadvisors.com

Customized Plans vs. Selling Products

As an independent advisory firm, we can choose strategies from a broad investment universe—not just certain products—when helping you build a customized financial plan that meets your unique goals. This flexibility keeps us particularly well positioned to suit today's volatile markets, and our main goal is always to help you protect assets and enhance growth across your portfolio. We prefer a collaborative environment with our clients as a path to building the financial plan that fits you best.

When working together, we'll take a forward-looking, comprehensive approach to developing a concise financial plan. We will adhere to that plan as an ongoing guide for analyzing and monitoring performance results, and adjust accordingly.

Our 3-T Doctrine: Transparent, Tactical, Targeted



Risk Management Is A Top Priority

Our approach is based on utilizing a wide spectrum of investment solutions to help determine appropriate risk-managed options that best suit your portfolio. We believe that this kind of diversification across multiple risk-controlled strategies helps manage wealth for both performance and protection.

That's why we emphasize a disciplined approach to financial, investment, and tax analysis to help you achieve your unique financial goals. Through a combination of conventional and alternative strategies, we provide an integrated financial perspective that stresses:

- Protection of principal assets
- Pursuit of enhanced growth
- Establishing your tolerance for risk
- Tax analysis and efficiency
- Measurability, year-after-year

A Holistic Approach with Integrated Solutions

Why Plan With A CFP®?

As more and more people have started calling themselves "financial advisors," it becomes more important for you to know how to identify the right professional to address your financial planning needs.

Working with a Certified Financial Professional (CFP®) is an important first step toward reaching your financial goals. Not only do these advisors meet rigorous education and experience requirements, but they are also held to one of the highest ethical and professional standards in the industry.

Paula Pass has met the demands necessary to proudly wear the CFP® label. As such, she abides by their Code of Ethics, which states that practitioners agree to act fairly and diligently when providing you with financial planning services by putting your interests first based on your needs, not the needs of the advisor.

Benefits Of Working With A CFP®

Advanced knowledge of investment universe that promotes holistic, integrated approach to financial planning

Comprehensive ability to develop, analyze, and monitor customized recommendations

Adherence to strict code of ethics that requires a CFP® to put the client's financial needs above their own.

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