Boland Financial Wealth Management
& Insurance Services

Northwestern Mutual
Wealth Management Company®

A Smarter Approach to Financial Planning

OUR MISSION

We value integrity and are committed to providing you with personalized service and individually tailored financial plan comprised of the intricacies and uniqueness of your goals and objectives.

We look forward to helping you reach your financial goal

Boland Financial Wealth Management
& Insurance Services

Pacific Guardian Center
737 Bishop Street
Mauka Tower, Suite 1700
Honolulu, HI 96813
P: 808.566.5340 | F: 808.528.4208
Email: marcus.boland@nm.com

OUR PLANNING PHILOSOPHY

We work with you to create a **comprehensive plan**

Your plan should be **tailored** to your specific financial landscape

We ask the right questions to help you **define and prioritize** you needs and wants

Advice based on your **best interest**

Your plan will have **specific goals**, **actionable items** and a **clear timeline**

Our goal is to provide relevant education, recommend solutions and partner with you to execute your Plan

OUR PROCEDURE

PLANNING FOR FINANCIAL INDEPENDENCE
RETIREMENT PLANNING

ACCUMULATION	TRANSITION	DISTRIBUTION
Human capital years	Prepare for new investment phase	Help optimize income
Savings discipline	Evaluate current security positions	Guaranteed income sources
Establish multiple future retirement income sources	Review product mix and adjust if necessary	Investment income- leverage multiple sources
Help maximize returns	Evaluate asset location	Help minimize taxes
Monitor goals	Manage income sources	

Northwestern Mutual does not give legal or tax advice. Taxpayers should seek advice based on their particular circumstances from an independent tax advisor. No investment strategy can guarantee a profit or protect against a loss.

OUR PROCESS

01 Introductory Conversations

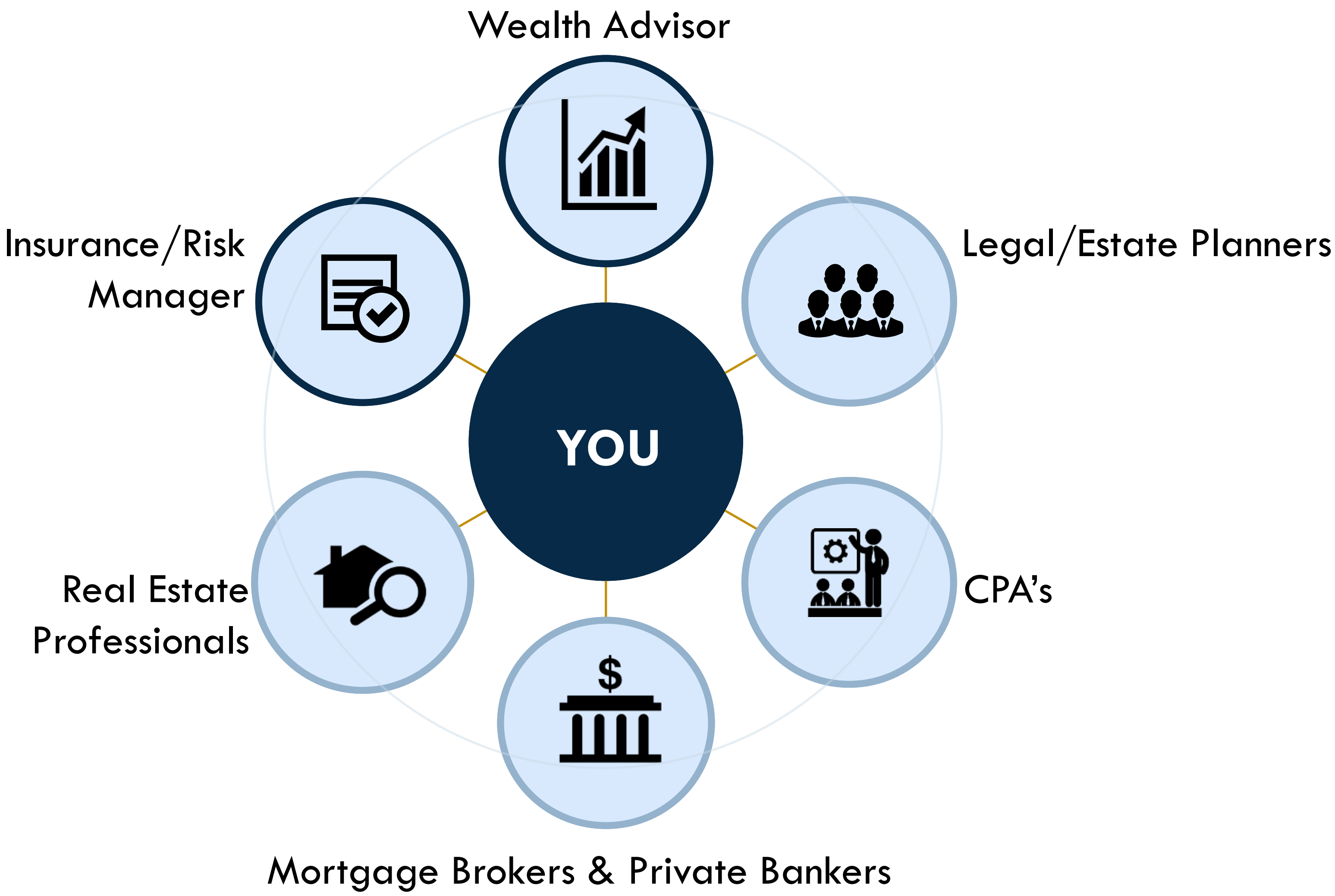
02 Data Gather & Discovery

03 Wealth Plan & Proposal

04 Action Plan

05 Onboarding

COLLABORATION WITH YOUR PROFESSIONALS



INDIVIDUAL FAMILY WEALTH MANAGEMENT PLANNING

YOU

- **Investment & Advisory Services**
  - Asset Allocation
  - Portfolio Rebalancing
  - Active/Passive Diversification
  - Tax Loss Harvesting
  - Performance Reporting
- **Estate Planning**
  - Trust
  - Minimize Estate Tax
  - Charitable Giving
- **Retirement Planning**
  - Retirement Analysis
  - Distribution Modeling
  - Beneficiary Modeling
  - Retirement Plan Consolidation
  - Lifetime Income Planning
- **Insurance Asset Protection**
  - Disability
  - Life
  - Long Term Care
- **Assistance to Loved Ones**
  - Educational Funding (529, trust, etc.)
  - Elder Care Planning
  - Legacy

HOW DO I KNOW IF THIS IS THE RIGHT OPTION?

Our best relationships are with clients where it is not a matter of ability or motivation – you simply want to outsource to experts. You appreciate niche expertise, new ideas, and validation of what's already going well.

We can provide a **detailed planning analysis** with projections of your key goals and how you are currently tracking

We will design a **clear roadmap** of where you are and where you are going. We'll also help you follow through on the plan with **regular reviews and check-ins**

We are **experts** and can uncover opportunities

We deliver outcomes. **We will help you get to where you want to go**

WAYS TO WORK WITH US

Wealth Management

"Tell me what to do and do it for me"

Flat-Fee Planning

"Tell me what to do and nudge me to get it done"

We know that not every financial problem is solved with a product

We will partner with you to educate, empower, and eliminate the burden of self-management

We will help you identify goals and opportunities, provide advice solely based on your best interest, and build a comprehensive plan

We will map out a timeline of touchpoints by our team to ensure each recommendation gets implemented

Tactical Planning

"I have a specific need and I want someone to help implement it"

We know some people have a plan and are looking for help to execute a specific solution

We will ask the right questions, educate you on options, and help you put a solution in place

WAYS TO WORK WITH US

Wealth Management

We directly manage investments on your behalf.

We will help integrate other accounts into your plan.

Assets managed by our team are charged an ongoing fee of 0.5% - 1.5% per year.

Flat-Fee Planning

A flat fee of $2,000+ is charged annually, based on scope and complexity of your planning needs.

Each engagement includes 12 months of follow up by our team. Should you become a Wealth Management client, future planning is done at no cost.

Tactical Planning

We will ask you questions and determine your specific need.

We will present you with options and help you implement your recommendation.

OUR TEAM

Marcus R. Boland, CLU®, ChFC®, CFP®, AEP®, CPWA®

Wealth Management Advisor

Since joining Northwestern Mutual in 1995, Marcus has worked closely with business owners and professionals to provide them and their families with financial guidance.

He holds Series 7, Series 66, Series 6, and Series 63 licenses, allowing him to both work with clients to build their portfolios and to trade securities and mutual funds on their behalf. Additionally, he has earned CLU®, ChFC®, CFP®, AEP® and CPWA® designations.

Marcus is a graduate of Colorado State University with a Bachelor’s Degree in Wild Life Biology and currently lives in Honolulu, Hawai'i with his wife Emma and his three daughters, Alisa, Sarah, and Tria. He is active within his own community and has served on several organizations’ boards, and is a current member of the Hawaii Estate Planning Council and Financial Planners Association. He previously led the Financial Planning Association, Hawaii Estate Planning Council and Waikiki Aquarium as President.

In his free time, Marcus enjoys surfing, Jiujitsu, golfing and fishing.

OUR TEAM

Olin graduated with honors from Utah Valley University with a Bachelors degree in Personal Financial Planning and has worked with Marcus since 2014.
He holds his insurance and security licenses and has also earned the designation of CERTIFIED FINANCIAL PLANNER™ (CFP®). He enjoys assisting in the financial planning process and using his problem-solving skills to tackle the unique challenges facing each client. He also assists Marcus in the implementation, and on-going service of client's risk management plans.

Olin Thomson, CFP®
Director of Financial Planning

Jill has extensive knowledge in the financial services industry with over 20 years of experience, and has worked with Marcus for over 10 years. She holds her Series 7 & 66 securities licenses, along with her insurance license. Jill graduated from the University of California Santa Barbara, with a Double Major in Business Economics and Communication. She assists Marcus as our Director of Wealth Management Services, and is our clients' principal liaison for all investment related matters.

Jill Grey
Director of Wealth Management Services

Tsuyaka has worked for Northwestern Mutual since 2016 and has joined Marcus' team in November 2019. She grew up in Okinawa and received her Bachelors from the University of Hawaii at Manoa in Asian Studies. She is insurance licensed and has her Series 6, 63 and 7. In her spare time, she enjoys spending quality time with her husband and their daughter.

Tsuyaka Arakaki
Associate Wealth Management Advisor

Emma has worked closely with Marcus Boland since 1996. She assists Marcus with Office Operations and Client Services. Emma graduated with her bachelor's degree from University of California, Los Angeles. She holds both insurance and security licenses.

Emma J. Boland
Director of Operations & Client Services

Kindra graduated from Utah Valley University with a Bachelor of Science degree in Elementary Education and has been a part of Marcus' team since 2016. She has loved putting her organizational and management skills to work by coordinating the actionable up items needed to implement our client's financial plans.

Kindra Thomson
Administrative Assistant

Disclosures

Marcus R. Boland, CLU®, ChFC®, CFP®, AEP®, CPWA®

No investment strategy can guarantee a profit or protect against loss.

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