Mesirow

Wealth Management

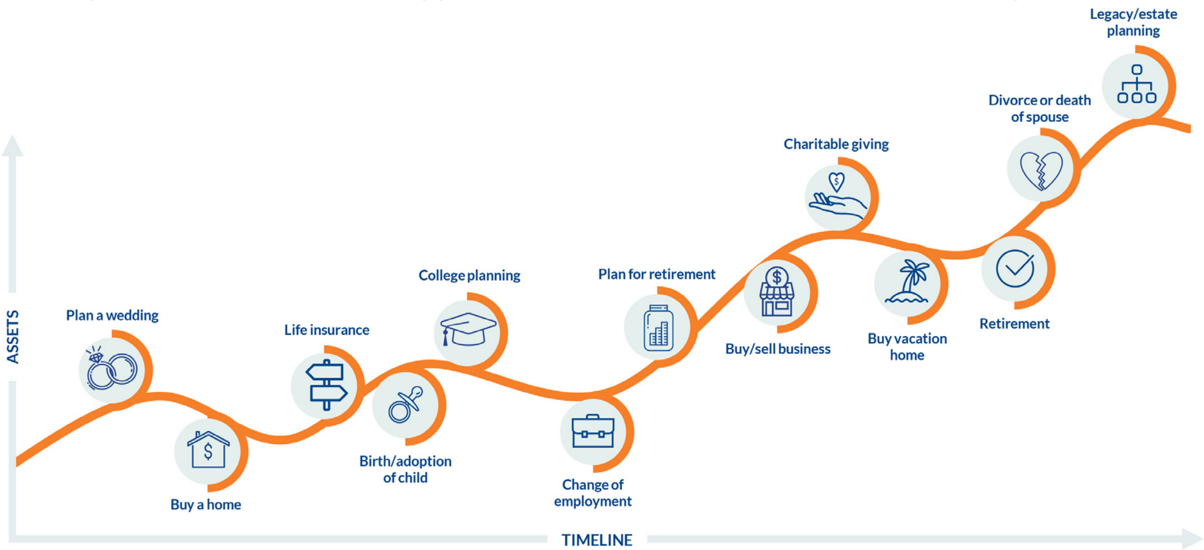
Unique clients require unique solutions

Since 1937, we have had the great privilege and responsibility to serve as wealth advisor for individuals and families like yours. This is a role we are well suited for and one we take very seriously. In fact, we measure our client relationships in years, and often generations, as we move in unison with our clients toward shared goals.

We begin by listening to your life story – where you've been, where you're going and how you think about money and wealth. You know what you're pursuing in life, and we know what you'll need from your financial resources to achieve those goals and ambitions. Over time, we work in conjunction with your other professional advisors to help you make financial decisions that support your most important life decisions.

Whether related to current and future lifestyle, college education for children and grandchildren, retirement, health and legacy, we know that your values, interests and financial needs are both unique and dynamic. That is why we are available to listen and advise whenever needed. We provide understandable, clear options, then work with you to decide which option is best at any given moment in your life.

Throughout life, key events trigger the need for informed decision-making



Over time, we listen intently and communicate regularly to help you navigate economic and market cycles, adjust your wealth plan, and help ensure you are on target to achieve your financial objectives. Authentic communication, consistent accessibility and an unwavering commitment to service define the Mesirow approach.

As we begin, clients often ask us how they can...

- Build a wealth portfolio to reach my targeted retirement date?
- Partner with a trusted advisor to help with estate planning and generational wealth?
- Create a philanthropic: legacy?
- Understand trends in the financial marketplace, and know how and when to adjust my wealth portfolio?
- Best plan for life expenses: travel, a new home, college, weddings?
- Generate the right level of retirement income?

To answer these questions and more, we partner with you to co-create a wealth management plan that organizes your financial life each step of the way.

The completed plan enables you see how your life goals can be achieved, resulting in a sense of confidence, satisfaction and peace of mind.

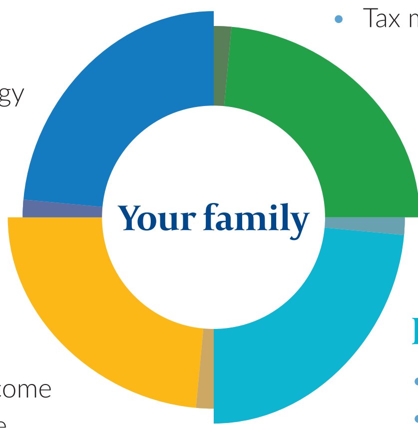
LONG TERM FINANCIAL PLANNING

Accumulate

- Goals planning
- College funding
- Life events
- Inheritance
- Acquisition strategy

Grow

- Asset allocation strategy
- Investment management
- Tax management



Distribute

- Retirement income
- Long term care
- Charitable giving
- Generational wealth transfer
- Estate planning

Protect

- Retirement planning
- Social Security strategy
- Domicile management
- Short-tern cash/liquidity management
- Debt management
- Insurance

Join our 83-year legacy

Mesirow Wealth Management is the firm's founding capability. We are the initial namesake business of Norman Mesirow, whose vision was to serve with purpose, applying the highest standards of professionalism in advising individuals and families on their most important life goals.

We look forward to having an opportunity to serve you and your family.

Awards

Top 100 Barron's RIA Firms 2021

About Mesirow

Mesirow is an independent, employee-owned financial services firm founded in 1937. Headquartered in Chicago, with locations around the world, we serve clients through a personal, custom approach to reaching financial goals and acting as a force for social good. With capabilities spanning Global Investment Management, Capital Markets & Investment Banking, and Advisory Services, we invest in what matters: our clients, our communities and our culture. To learn more, visit mesirow/wealthmanagement.com and follow us on LinkedIn.

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