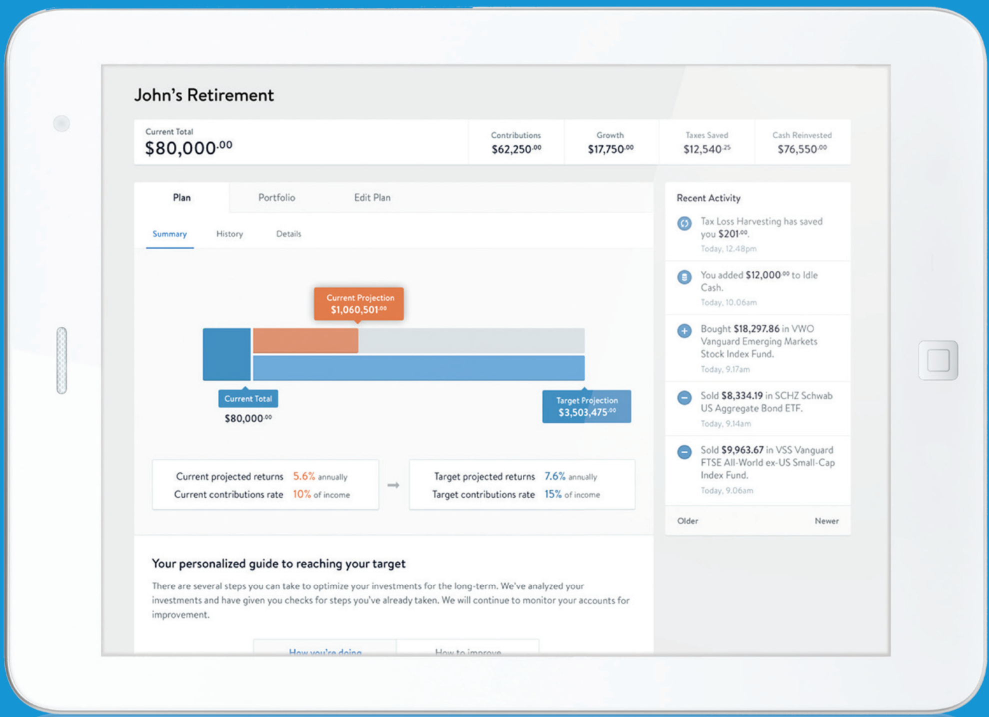
GUIDED WEALTH PORTFOLIOS

Start investing for your future today

Rockhopper Financial
Retirement Planning & Financial Strategies

Invest for your future with our new online platform that combines the benefits of a personal financial advisor with sophisticated technology.



TECHNOLOGY + ADVISOR

You still get Robert Beck's experience and expertise, but with the added convenience and transparency of an automated investing solution. Guided Wealth Portfolios provides you personalized, objective investment advice through an online platform with 24/7 access to your accounts.

While other digital investing solutions, or robo advisors, offer online investment management, most don't include a direct personal relationship with a dedicated financial advisor. With Guided Wealth Portfolios, I'll be your personal advisor, dedicated to you and your goals, helping to guide you throughthe investing process.

Our Guided Wealth Portfolios platform offers:

Personalized planning, service, and advice

The path to your financial goals is personalized for your specific stage in life, and it will change as your life changes. If you ever have any questions, your advisor is only a phone call away.

Intuitive, intelligent technology

See your accounts in one place, open new accounts, view your portfolio, and make updates via your personal portal. The technology makes the process fast and easy.

Advanced wealth management

We can implement your personal roadmap using proven investment techniques. Receive allocations designed for you and your savings goals, and benefit from trading techniques that may increase diversification and can help reduce taxes. Whatever your retirement goals, we can help you.


Personalized roadmap
Holistic advice
Financial advice
Tax-efficient investing
Tax-loss harvesting
Consistent monitoring

INTELLIGENT INVESTING

Guided Wealth Portfolios offers investment management designed to help you pursue your financial objectives. By investing with us, you receive:

- **Personalized roadmap**—Based on your goals, investing time horizon, and risk preferences, you'll receive an investment allocation and roadmap designed to help you pursue your objectives. As you get closer to retirement, your allocations will gradually change.
- **Holistic advice**—By considering your retirement objectives and investments, our analysis allows you to work toward your investment goals.
- **Tax-efficient investing**—Through advanced asset analysis, we'll allocate your assets in a tax-efficient manner and evaluate the tax impact of each trade before it goes through.
- **Consistent monitoring**—Your portfolio is monitored daily, keeping it on track as markets move and rebalancing it as needed.
- **Tax-loss harvesting**—If an investment experiences a loss, we may sell it to offset taxable gains in your portfolio. The investments sold are replaced by similar investments to maintain your asset allocation, so you get tax benefits while keeping a properly diversified portfolio.
- **Financial advice**—We're available any time you have a question about your account or investing strategy.


My Investment Strategy:
Aggressive Growth
Update your Investment Strategy
How Much I Plan To Save for Retirement
We factor this into our estimate of how much money you'll have at retirement.
13%
of income
I plan on saving $1,625 monthly
$150,000
Retirement Income
I expect to receive
$0
per year from other income (e.g., pension, annuity, etc).
I expect retirement income to last for
25
years.
Social Security
I will receive
$32,765
per year starting at age 67.

SEE YOUR PROPOSAL

Before opening an account, you can get a proposal that shows you sample recommendations for your portfolio and what you could potentially accomplish with Guided Wealth Portfolios. To get started, we'll take you through three easy steps:

1. **Tell us about you**. Tell us the story of your investing time horizon, style, and goals. We want to develop an investing strategy just right for you.
2. **Link your investment accounts.** Let us know what you've currently saved or invested. This will help us give you a holistic view of your investment accounts and better understand how to best build your portfolio. Our proprietary software links directly to your existing accounts, so the sample recommendations match up exactly to your holdings.
3. **Get an immediate analysis**. Guided Wealth Portfolios analyzes the account information you provide. Our proprietary algorithm's sample recommendations help you understand what to keep, what to change, and why.

When you're ready to open an account, Guided Wealth Portfolios will put your plan into action, monitor your investments daily, and take strategic action when markets shift to help you pursue your long-term goals.

To receive your dynamic proposal and find out what you could potentially achieve with Guided Wealth Portfolios, go to www.lplguidedwealth.com/RobertBeck.

All investing involves risk including loss of principal. No strategy assures success or protects against loss. There is no guarantee that a diversified portfolio will enhance overall returns or outperform a non-diversified portfolio. Diversification does not protect against market risk.

References to tax strategies that the Guided Wealth Portfolios service investment management considers in managing accounts should not be confused with tax advice. LPL Financial does not provide tax advice. Clients should consult with their personal tax advisors regarding the tax consequences of investing.

START TODAY

To receive your dynamic proposal and start investing for your future today, go to www.lplguidedwealth.com/RobertBeck.

Guided Wealth Portfolios (GWP) is a centrally managed, algorithm-based, investment program sponsored by LPL Financial LLC (LPL). GWP uses proprietary, automated, computer algorithms of FutureAdvisor to generate investment recommendations based upon model portfolios constructed by LPL. FutureAdvisor and LPL are non-affiliated entities. If you are receiving advisory services in GWP from a separately registered investment advisor firm other than LPL or FutureAdvisor, LPL and FutureAdvisor are not affiliates of such advisor. Both LPL and FutureAdvisor are investment advisors registered with the U.S. Securities and Exchange Commission, and LPL is also a Member FINRA/SIPC.

IPS-0027-0916 Tracking #1-515014 (Exp. 02/19)

Not FDIC/NCUA Insured	Not Bank/Credit Union Guaranteed	May Lose Value
Not Insured by any Federal Government Agency		Not a Bank Deposit

Robert Beck
Financial Advisor
848 Main St, Ste 18
Billings, MT 59105
(406) 294-5390 Office
(406) 294-5391 Fax
robert.beck@lpl.com

Rockhopper Financial
Retirement Planning & Financial Strategies