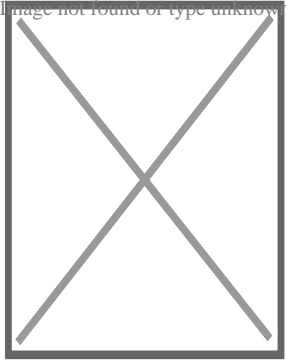


Our Process



The role of the Crawley Wicker Johnson Wealth Management team is to provide stewardship and oversight as you pursue your financial and life goals. Our process includes:

- Listening carefully to you regarding goals, risk tolerance, and time horizon.
- Creating an investment and asset allocation strategy as the basis for advice, taking into consideration your financial goals.
- Providing a team approach to investment research and selection process for stocks, bonds, mutual funds and outside professional money managers. We are also backed by an extensive network of industry experts who provide fundamental and technical research on securities we select in designing custom investment portfolios.
- Conducting regular portfolio reviews and responding to changes that may call for adjustments and updates to your investment plan. All clients receive a complete financial review periodically.
- Coordinating as needed, with your other professional advisors including your CPA, attorney, and in some cases, your insurance agent.

Risk Management

We have the experience and flexibility to help you establish and administer a sound endowment policy based on a commitment to key principles, including:

- Establishing an asset allocation and spending policy that is compatible with your goals and needs
- Understanding the components of risk and deciding on acceptable parameters
- Diversifying to increase return and reduce overall portfolio risk
- Access to leading professional portfolio managers