



Fifth Third
Wealth Advisors®

FIFTH THIRD WEALTH ADVISORS®

Dedicated investment expertise backed by the
resources of Fifth Third Bank.



FREEDOM TO

Your financial success is more than just a number.

It's what you need to confidently live the life you've envisioned—while also providing for those you love.

At Fifth Third Wealth Advisors, your interests always come first. We don't take our eye off your financial objectives—and we'll provide the expertise of our advisors and access to the full resources of Fifth Third to assist you in achieving those objectives.

Your goals are our goals, and we'll work to help you reach them with:

- INVESTMENT MANAGEMENT EXPERTISE
- ROBUST RESOURCES AND CAPABILITIES
- TAILORED SOLUTIONS
- ADVICE AND PLANNING

FLOURISH



OUR DIFFERENCE:

Experienced financial advisors and client-focused advice —with Fifth Third's resources at your service.

As a Registered Investment Adviser, we have a fiduciary responsibility to provide you with professional, client-focused advice centered on what we believe is **best for you** and your financial goals.

At the same time, we have the opportunity to leverage the broader capabilities of Fifth Third Bank, which may include trust and estate services, risk management and insurance and credit solutions, mortgages and banking services.

You'll get the investment management expertise and responsive service you are looking for and have access to a wide range of financial services and solutions tailored for your unique needs.

HOW WE WORK WITH YOU

We're guided by three key operating principles:

Listen to learn.

We take time to understand:

- Your life, family and values
- Your concerns
- Your aspirations



Build and protect wealth.

Your highly customized investment portfolio is designed with the objective to maximize your wealth, while also seeking to protect principal through the use of tax-sensitive strategies. Tailor-made by our team of investment management experts, your portfolio will be designed to align with your goals, time frame, and risk tolerance.



Client focused, always.

As a Registered Investment Adviser, we're a fiduciary. We'll seek to manage your money with your best interests in mind, providing you with objective, tailored guidance.





INVESTMENT MANAGEMENT, MADE PERSONAL

The investment world is complex and constantly changing. Your life, needs and risk tolerances change over time as well. That's why we take a personalized approach to investment management. **Your advisory team will develop a customized investment strategy to help achieve your specific investment goals.**

Our investment services include:

- Disciplined portfolio construction
- Impartial advice with open architecture
- Access to environmental, social, and governance (ESG) investing
- Consistent and clear reporting of performance





Count on robust capabilities

We can deliver sophisticated solutions for complex needs, including:



- Customized strategic and tactical asset allocation
- Individual fixed income and equity instruments
- Alternative investment strategies, private equity, and debt
- Equity risk management solutions for concentrated assets
- Tax-efficient investments

PORTFOLIOS BUILT WITH PRECISION

Markets are dynamic, and so is our investment approach. We combine our longer-term investment view with proactive attention to shorter-term strategic trends and movements in the market.

Bringing you a variety of investment options.

We believe in the strength of a broadly diversified portfolio that incorporates investment strategies from around the globe. Your portfolio may contain some or all of the following:

- Taxable and tax-exempt bonds; inflation-protected, international and high-yield securities
- Large, mid and small cap stocks in domestic, developed international and emerging markets
- Real estate
- Cash equivalents



Fine-tuned for markets, goals and life.

Along the way, we'll continually manage your portfolio—and keep an open channel of communication—to ensure that any changes or events in your life are considered and that your portfolio is still aligned with your objectives.



HERE FOR ALL ASPECTS OF YOUR FINANCIAL LIFE

Take advantage of all Fifth Third has to offer.

At Fifth Third Wealth Advisors, we're able to go beyond supporting your wealth planning and investment needs to give you access to the resources and financial strength of Fifth Third Bank. Whether you need help finding a mortgage for a second home or selecting the best retirement plan for your employees, your wealth advisory team can introduce Fifth Third Bank professionals to deliver the right solution for you.

Offering tailored solutions through:

- Custom credit and mortgage lending
- Trust, estate and fiduciary services
- Risk management
- Commercial credit, banking and treasury management
- Full-service banking support



A TEAM DEDICATED TO YOU:

Client-focused advice. Holistic planning. Ongoing support.

At Fifth Third Wealth Advisors, we provide a fully coordinated approach to your financial life. Your wealth advisor will access a team of planners, investment professionals, private bankers and trust advisors who are ready to help and support you — whenever you need it.

Providing comprehensive advice and planning for:

- Growing, preserving, and protecting assets
- Cash flow and retirement
- Tax efficiencies
- Risk management
- Wealth transfer
- Business succession



**Wherever you are on your wealth journey, we'll
be right by your side.**



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Fifth Third does not provide tax or legal advice. Please contact your attorney or tax advisor for advice pertinent to your personal situation.

Past performance does not guarantee future results.

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Fifth Third Wealth Advisors offers tailored investment advisory services to high net worth individuals and institutional investors. Fifth Third Bank offers banking, investment and insurance products and services.

Deposit and credit products provided by Fifth Third Bank, National Association. Member FDIC.  Equal Housing Lender.

Insurance products are made available through Fifth Third Insurance Agency, Inc. Insurance products are not offered in all states. Please consult with a Fifth Third Insurance Professional.

Investments, investment services and insurance: **Are Not FDIC Insured | Offer No Bank Guarantee | May Lose Value | Are Not Insured by any Federal Government Agency | Are Not a Deposit**