What is the True Meaning of Wealth for You?

FRIBERG
WEALTH MANAGEMENT

Planning for the Future with confidence

Experience the Difference

Take a moment to see what makes Friberg Wealth Management special.

- Education, Experience and Credentials — Scott is a CERTIFIED FINANCIAL PLANNER™ professional, CPA, and Certified Estate Planner™ certificant with a masters degree from the University of Virginia and 30 years of financial experience.
- Life Planning Passion — Scott's passion for life planning is reflected in his holistic approach to developing your financial plan, considering not just your finances, but the special people and experiences that are important to you!
- We ALWAYS put our clients' interests first.
- Personal Relationships — We are dedicated to building ***personal*** long-term relationships with our clients, focused on comprehensive financial planning.
- Independent — We are independent and work for you! We are not obligated to represent specific firms or products.

Welcome

> "If one advances confidently in the direction of his dreams, and endeavors to live the life which he has imagined, he will meet with a success unexpected in common hours."
>
> ~Henry David Thoreau

We recognize that WEALTH is not just about IRAs, bank accounts, investments and retirement accounts.

The True Meaning of Wealth is individual for each one of us. It includes not just our financial assets but our dreams, goals, and values and other things such as our relationships, health, time, education and special memories.

We invite you to take a look at Friberg Wealth Management and see what sets us apart from the rest.

Our Mission

We help our clients enrich their lives by partnering on an inspiring journey towards their goals and dreams. We seek to accomplish this by:

- Building and nurturing strong personal relationships
- Delivering caring, personalized service and guidance
- Offering comprehensive financial planning, education and proactive wealth management strategies

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Our personalized services can help guide you from where you are to where you want to be. We offer:

- Fee-Based Financial Planning
- Wealth Management
- Risk Management
- Legacy Planning

We also serve as your advocate when integrating the services of other professional firms such as Estate Planners and Tax professionals. We serve as your comprehensive financial coach.

Our Financial Planning Process

Friberg Wealth Management follows the six step financial planning process sanctioned by the CFP Board of Standards. Using these six steps, we define your future life goals, assess where you are now, and strategize alternative action steps to progress towards your goals. Here's what you can expect:

Step One:
Establish the client-advisor relationship.
We meet to find out how we might be able to help you achieve your goals and dreams.

Step Two:
Gather client data and define goals.
We listen to you and we work together to define your personal and financial goals, your time frame for results, and how you feel about risk. What is the true meaning of wealth for you?

Step Three:
Analyze and evaluate your financial status.
Areas of relative strength and risk are identified.

Step Four:
Develop and present strategic solutions.
We explore and discuss possible solutions to improve the likelihood of achieving your goals, while managing risk.

Step Five:
Implement the financial planning recommendations.
We agree on how recommendations will be carried out. We serve as your coach, coordinating with you throughout the implementation process.

Step Six:
Monitor progress toward your goals.
We will have ongoing progress meetings. Every effective plan needs to be monitored and adjusted as needed.

About Scott

Scott Friberg is a CERTIFIED FINANCIAL PLANNER™ professional, CPA, Certified Fund Specialist, and Certified Estate Planner™ certificant. Scott holds a Masters degree from the University of Virginia. He offers a breadth of strategic financial experience resulting from 30 years in financial services, with 20 years specializing in personal financial planning.

Scott has a passion for life planning and helps people design their "dream life" and guides them towards making their dream become a reality. Scott has lived in Northern Virginia for over 45 years and currently resides in beautiful Round Hill, Virginia in Loudoun County. He and his wife Sandy are the proud parents of two daughters and a son. He and his family enjoy being close to nature, boating, camping, biking and vacationing at the beach.

Making Time for What's Important to You

"The essence of my business philosophy is to help you pursue your goals. Serving your needs is the reason I'm in the financial planning profession."

— Scott Friberg

Our Locations *(By Appointment Only)*

Western Loudoun Office and Mailing Address

35531 Williams Gap Road

Round Hill, VA 20141

Phone: 540-751-1410

Fax: 540-751-1450

www.FribergWealth.com

Ashburn / Lansdowne Office

19415 Deerfield Avenue, Suite 204

Lansdowne, VA 20176

(Note: Please do not send mail to this location)

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