Why Choose WRIGHT Financial Group?

WRIGHT Financial Group LLC | 6802 Paragon Place, Suite 410 | Richmond, VA 23230
(804) 591-1657| info@WrightFinancialGroup.com | www.WrightFinancialGroup.com

"What really makes a firm unique is the wisdom that's gained from experience, and the ability to transform that wisdom into selfless guidance." –Tom Wright

What Makes Us Unique

WRIGHT Financial Group LLC is an independent Registered Investment Advisor (RIA). WFG acts as a fiduciary and delivers personal financial planning and investment management by utilizing the latest innovations in technology and research.

Like the NASDAQ exchange, which trades electronically instead of using a trading floor, we forego the expense of retail office space. We meet face-to-face in a virtual office location near you*, or by phone or video conference. We answer calls, respond to voicemails and emails, every day, even on holidays. In today's connected world, it's what you should expect.

We're not your father's stock broker. We manage investments using the latest academic research. We utilize state-of-the-art technology to optimize our portfolios to provide maximum upside potential with minimum downside risk. And we use secure cloud services to provide our clients with real-time access to their account information and financial plans 24/7/365 from the comfort of their own homes.

Best of all, we leverage all the above to help keep our fees low. In fact, in 2013 and again in 2016, we lowered our fees, for existing and prospective clients

Our Group

Tom Wright is a CERTIFIED FINANCIAL PLANNER™ professional (CFP®) with over 25 years of experience serving clients in New York City, Seattle, WA and Richmond, VA.

Jennifer Wright is a licensed Certified Public Accountant (CPA) with over 25 years of experience with top accounting and law firms in Washington, DC, Chicago, IL, Paris, France, and Richmond, VA.

As fiduciaries, we have an obligation to work in your best interest, not ours.

Benefits of Working with Us

Experience – With over 50 years of combined experience from around the world, we can help you navigate "the street" with a solid financial plan and clear investment objectives.

Independence – We are not pressured to sell products or to meet quotas. We are free to give the advice and to build the portfolios that will help our clients reach their dreams.

Low Fees – Our low annual fee is sometimes up to half of what other advisors charge**. (Page 3)

Holistic Advice – Investment advice on anything financial, including bank accounts, brokerage accounts and company plans (401(k), 403(b), 457) that are not held at our custodian, TD Ameritrade.

Technology – We lead, not follow. We've partnered with the best and brightest technology providers to assure that our clients have confidence in reaching their dreams.

Financial Planning – How likely are you to you reach your retirement goals? We can tell you with RightCapital. Add all your online financial accounts to see the big picture. See how changes in your income, savings and budget affect your retirement plan in real time.

More than Mutual Funds – Customized portfolios that include ETFs, mutual funds, stocks, bonds, CDs, annuities and alternative investments.

Protection – When appropriate, we protect your principle with FDIC and insured products.

Accredited Investors – Access to Private Equity and Venture Capital deals***.

Fees and Minimums

WRIGHT Financial Group LLC's investment advisory fees are based on assets under management. The minimum household investment is $50,000 and the minimum household annual fee is $500. This would include all accounts within a single household. All fees are billed quarterly in arrears.

Discretionary Assets (Assets held at our custodian, TD Ameritrade)

- The fee for discretionary assets is the lesser of 1% or $5,000 per million on an annualized basis (A $1 million investor will pay just 0.5%, less than half of what the average advisor charges**)

Held-Away Assets (Assets not held at our custodian, TD Ameritrade)

- The fee for held-away assets is 0.5% on an annualized basis

Financial Planning Only

- $1,000 on an annualized basis

Family Office Services

- The fee for family office services is the lesser of 1% or $25,000 per $5 million on an annualized basis

**Virtual office space provided by Regus*
***AdvisoryHQ.com, the average fee for assets equal to $1,000,000. is 1.02%*
****PE and VC investments Involve greater risk and require Accredited Investor qualification*

WRIGHT Financial Group LLC provides a unique approach to investing and finances that can help significantly increase the amount of money you get to keep when all is said and done. We help individuals, families and small businesses reach their dreams by providing the Right Investment Advice™, a 1-2-3 combination of investment management, financial advice and financial planning.