

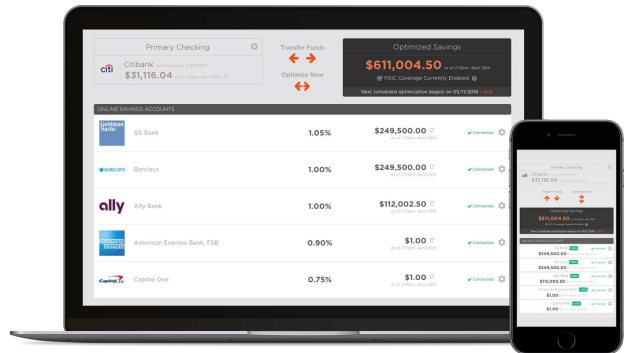


MaxForAdvisors.com

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MAX is an intelligent cash management service that helps high net worth professionals and their advisors optimize their returns on cash. Doctors, lawyers, bankers, entrepreneurs and consultants know they ought to be optimizing their portfolios, yet are too busy — and their time is too valuable — to adequately focus on active management of their assets. Cash, as an asset class, is often ignored.



MAX presents a compelling solution to a longstanding problem — the near-zero returns on cash offered by most banks and money market funds. By taking advantage of the lower costs and higher rates offered by FDIC-insured online banks, **MAX** is able to help deliver 0.70% to 0.90% more in interest each year than is otherwise generally available in the market, all within an FDIC-insured environment. The result can be tens or hundreds of thousands of dollars in incremental interest income over a typical investment horizon.

MAX is simple. It monitors interest rates daily. Once a month, it instructs the transfer of funds among a member's own bank accounts to help maximize interest income. **MAX** also helps investors stay within the FDIC insurance limits and move and sweep cash between checking and savings in an intelligent manner. **MAX** members retain their existing checking accounts, so direct deposit and bill-pay are unaffected.

MAX is secure. **MAX** is not a bank and never takes custody of funds. All funds transfers are handled by a member's own banks. **MAX** was designed with security in mind and has been analyzed and tested by one of the leading software security consulting firms that also consults for many leading global banks.

MAX operates independently. **MAX**'s website contains no advertising, and member information is kept in strict confidence. **MAX** charges clients an annual fee of 0.08% on the deposits being optimized, billed quarterly.

MAX is available to individual investors by visiting MaxMyInterest.com.

MAX provides valuable benefits to advisors as well. Visit MaxForAdvisors.com to learn more.

MAX serves businesses and commercial accounts through its partnership with The American Deposit Management Co. Learn how you can gain more yield and FDIC insurance for your institutional accounts by visiting MaxForBusiness.com.

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