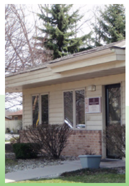
Live Your Great Life

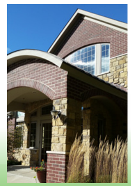
FINANCIAL SERVICE GROUP INC

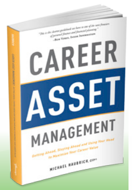
BUILDING AWARENESS | CREATING POSSIBILITIES | FOSTERING PEACE OF MIND

In the hustle and bustle of every day, it's refreshing to take a pause and remember what it's all about. As Financial Service Group continues to inspire our clients to realize their great lives, it's energizing to look back on the journey we've taken to become the firm we are today.

Back in 1983, Mike Haubrich envisioned a lifestyle practice that would allow him to provide superior service to a relatively small number of clients. Starting as a one-person office with just a few clients--many of whom are still our clients-- Mike gradually added more team members who have contributed to Financial Service Group's client family growing to more than 200. We revel in the rewarding relationships we have with our clients and we are honored to be with you through the changes you experience throughout your lives.







1983 Financial Service Group incorporated. Its first office was in a two-room upper level at 5200 Washington Avenue

1984 Moved to 6214 Washington Avenue

1986 Moved to Mariner Drive

1992 Moved to 6011 Durand Avenue

1996 Terri (Larson) D'Alie joins FSG and we transition to a fee-only model

2003 Justus Morgan is added to the team

2006 Launched Career Asset Management, an industry innovation

2008 FSG moved to its current location on Northwestern Avenue

2011 Introduced our Relationship Fee structure

2014 Mike's book *Career Asset Management: Getting Ahead, Staying Ahead and Using Your Head* was published by Advantage Media

Throughout all the changes, our commitment to providing quality financial advice to an increasingly sophisticated, informed and knowledgeable public has been a constant. We've always believed that to be recognized for being different, we had to stand above those claiming to be our "competitors." Here are just a few ways we believe we do that:

- We form deep, lasting relationships with our clients by listening and truly caring about how you define your great life. Then we work tirelessly to help

At FSG, we commit that we will:

- Provide a comfortable environment, free from pressure to buy financial products
- Invest the time to really listen to you talk about aligning your money with your current life and future goals
- Use language that is easy to understand and avoids industry jargon
- Be connected, returning your calls or emails within one business day
- Be a constant in your life—there whenever you need us and providing pre-planned meetings to review, strategize and review your plans
- Summarize our meetings in writing for future reference and clarity
- Support you with other reliable resources that you might need, and work collaboratively with your other professional resources (Accountants, Attorneys, Insurance Agents and others)

ensure you experience the financial well-being that will help you realize your goals and live the great life you've defined;

- We don't collect commissions. We are only paid through our completely transparent Relationship Fee. That means you'll never have to search through pages of a financial prospectus to find out what we charge. Our fee-only model positions us to serve you in the ways that ensure your best interests;
- We create a comfortable environment where our clients can experience a home-like setting and our team can do their best work;
- We access technologies and have systems and processes in place that allow us to provide unprecedented service delivery and add greater value to you. We're always looking at ways to upgrade and invest in new technology platforms;
- We're structured in a way that allows us to easily transition clients among our highly skilled financial planners based on your needs at any given phase of your life. This benefits you through the diversity of ideas, experiences and wisdom of our entire financial planning team;
- We offer a full range of financial services and thought-leading innovations such as Career Asset Management, along with the more traditional areas including retirement, tax, insurance, real estate, long-term care, estate planning and others;
- We grow at a rate we can sustain without losing our personal touch with each of our clients. You matter to us and we strive to make sure you always feel that.



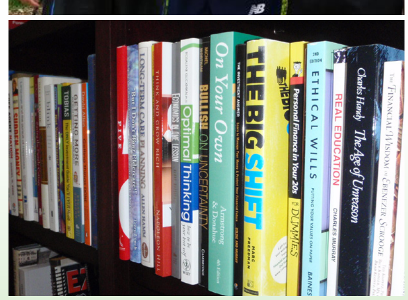
Our Team Approach Ensures You Get What You Need

We are intentional about working as a team to bring you the best thinking and approach to your financial plan and well-being. We believe the ensemble nature of our firm allows each of our highly qualified financial planners, including multiple CFP® professionals, to bring their unique expertise to the table in working with you.

That degree of intentionality means that as we add staff, we're thinking ahead to what your future needs may be and the type of expertise you may need to support your goals. We hire with the intent of retaining the best talent in the industry and ensuring continuity for you even when we experience internal changes.

Invested In Our Community

We have been a fixture for clients in southeast Wisconsin for over three decades and are proud of our beautiful building that stands as our long-term commitment to our community. We're also proud of the other ways we support our local area through volunteer service, event sponsorship and involvement on various boards.



Our Well-Being Book Program provides the opportunity to extend the financial education of residents of our community. All we ask in return is that when you're done reading one of the books in our program, you pass it along to someone else so they can expand their learning as well.

Our no-cost workshops and community discussions are open to the public and offer another opportunity to learn about a variety of financial topics throughout the year. We believe that a more informed community will make better decisions around their money. When that happens, our entire community benefits and grows as a result.

And we continue to demonstrate gratitude for your referrals by donating $100 each time you send someone to our office for a no-obligation and no-cost conversation about their financial well-being.

We are proud of our reputation and what we've built. Serving you and being able to make a difference in your great life is what energizes and inspires us every day and we value being granted that privilege.

FINANCIAL SERVICE GROUP INC

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