LET'S PLAN IT SO YOU CAN LIVE IT.

JOHNSON BIXBY

You can find fragments of financial advice anywhere you turn. But it’s much harder to find a dedicated partner to help you decipher the information and navigate life’s many turns and possibilities.

At Johnson Bixby, we advocate for the long haul with holistic insights and planning customized for where you want to go.

It’s our promise and our passion.

A SMART PLAN AND TRUSTED GUIDE

We've been helping clients plan for their future since 1983. People come to us because of our personal and comprehensive approach to financial planning. They stay with us because of our continuous involvement and commitment to their success.

Over the years, we've had the privilege of developing relationships that last decades. Your well-being and financial future becomes deeply personal to our team. By building long-term relationships with our clients, we are able to understand your unique situation, goals, questions and challenges.

No matter the situation, our aim is to provide clients a roadmap with smart solutions to help them move toward their ultimate goals. You can trust our knowledgeable team as we guide and empower you to make informed decisions about your future.

CLIENT FIRST APPROACH

As a fiduciary, we put your interests first. We are not locked into any single sales platform. Nor do we sell proprietary products. That means you can count on placing the utmost trust and confidence in us as your advisors.

We provide you with the highest standard of care in return. Not only are we compelled to do this as investment adviser representatives we are obligated to act solely in your interests by law, and our code of ethics.

HOW WE'RE COMPENSATED

We're a fee-based comprehensive financial services firm. Our charges are typically based on a percentage of assets under management. Your fees for services will be set appropriately for your level of assets and the complexity or simplicity of your financial situation.

It's best to dig into this a layer deeper when we're face to face so we can speak to your specific situation.

OUR EXPERIENCED TEAM **IS HERE TO SERVE YOU.**

We apply the expertise of our whole team to offer long-term, personalized financial counsel that guides you to the specific places you want to go. Here's how our team is set up for your success and ours.

FINANCIAL PLANNING & INVESTMENT STRATEGY

Our planning and investment strategy teams work with you on a financial plan that will help you maximize your potential and help you achieve life's goals—with intention.

What we do for you:

- Create a comprehensive financial plan and help keep you accountable to achieve your goals and dreams.
- Coordinate details regarding cash flow, tax strategy, and estate planning.
- Stay up to date on tax law and economic changes to ensure you're maximizing opportunities and keep you heading in the right direction.
- Act as a sounding board, and provide counsel and advice on a variety of life issues.

Investment management and advisory solutions for individuals and families:

- We focus on customized strategies and a disciplined approach to investing.
- We design cost-efficient portfolios from the entire universe of public investment vehicles based on your individual objectives and risk tolerance.
- We develop tailored solutions based on individuals goals.

CLIENT SERVICES & ADMINISTRATION TEAM

Our Client Services and Administrative Specialists have the primary responsibility of providing outstanding service to you. They work closely with our Financial Planners to make sure your needs are being met.

What we do for you:

- Answer client inquiries and assist with financial transactions.
- Reach out to our clients to request necessary documentation to ensure our records are up to date prior to scheduled meetings.
- Assist Planners by sitting in on your meetings and taking notes, then processing follow-up, trades, and paperwork.
- Implement changes to your account, such as updating addresses, beneficiaries and banking details, as needed.
- Track multi-step processes and all moving parts to ensure they are completed promptly and accurately.

its INTEGRATED TAX SERVICES

Our expert tax department handles all your tax preparation needs. When you use our Integrated Tax Services team, your Financial Planner has the ability to closely monitor the implementation of tax strategies developed during the planning process.

OUR SERVICES

There are many aspects to your financial picture, and our expert team can help you navigate the complexities.

At Johnson Bixby, you'll get intelligent and customized planning made possible by our understanding of your unique situation, goals, questions and challenges.

Take a look at our core services below and give us a call with your questions. We're happy to discuss your needs—whether that's taxes, investments, insurance, retirement, real estate or estate planning—really, anything financial.

Retirement planning	Investment strategies	Tax strategies and preparation	Insurance review	Pension planning
Employee benefits decisions	College savings and funding	Charitable and legacy giving	Estate planning	Transition planning

"Goals are your destinations in life; objectives are the stops along the way."

–Gerard de Marigny

IMAGINE HOW YOU'LL FEEL
WHEN YOU'RE MAKING MORE INFORMED DECISIONS ABOUT YOUR MONEY

Trust us—we're as choosy about our client relationships as you are in picking the right financial advisor. If this is going to be a long-term partnership, we want to make sure we've both made the right decision.

EMPOWERED

When you make a plan and feel in control of your finances, you open up possibilities for your life. Where do you want to go?

HAPPIER

You can live your best and biggest life when you have the right plan. It's why we do what we do.

CONFIDENT

Money is a very personal matter to most of us. Our expert team will put you at ease and help you build confidence over time.

FREER

Life throws a lot of things at us. We help you think ahead and free yourself of the emotional burden that comes with big financial decisions.

SMARTER

With a knowledgeable and trusted guide, you'll make intelligent, more informed decisions for your future.

AT EASE

A comforting partner who understands your long-term hopes and aspirations.

![KMS Financial Services, Inc.]

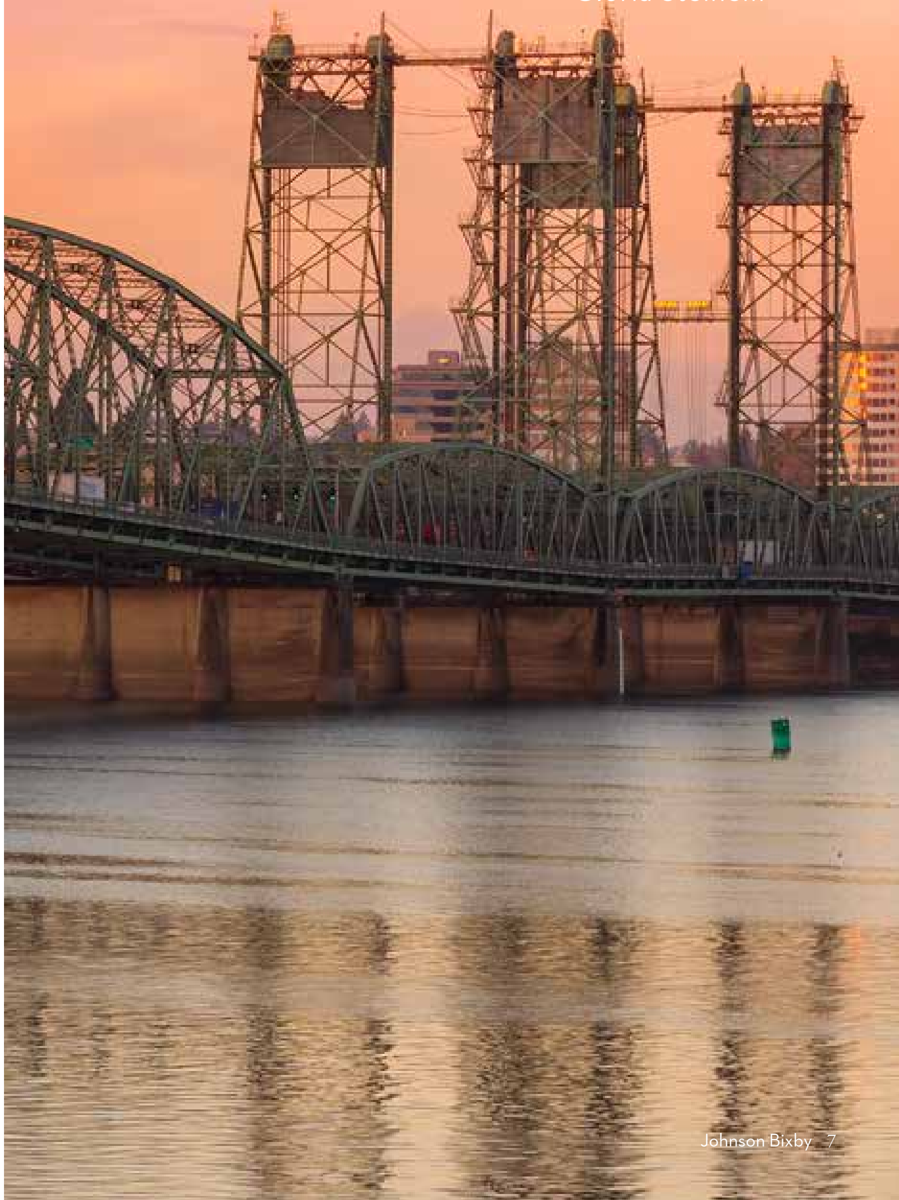
We offer securities and advisory services
through KMS Financial Services, Inc.

Advisory and securities licensed representatives are registered through KMS Financial Services, Inc., located in the Pacific Northwest. They provide us with regulatory, compliance and reporting services, as well as access to a wide selection of planning and investment options.

KMS is a member FINRA and SIPC
and is an SEC Registered Investment Advisor.

"Without leaps of imagination or dreaming, we lose the excitement of possibilities. Dreaming, after all is a form of planning."

–Gloria Steinem



JOHNSON BIXBY

Let's plan it so you can live it.

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GIVE US A CALL, AND FIND OUT HOW WE CAN HELP YOU PLAN FOR THE ROAD AHEAD.