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EXPERTISE WITH INTEGRITY™

BARRESI FINANCIAL, INC
Expertise With Integrity™

2019 CORPORATE BENEFITS BROCHURE

TODAY WE HAVE BUILT A HIGHLY CAPABLE AND PROFESSIONAL STAFF, WHILE CONSTANTLY LOOKING FOR WAYS TO GROW, PARTNER, COLLABORATE, AND DEVELOP WAYS TO BETTER ASSIST OUR CLIENTS.

WORD FROM THE FOUNDER

Marcus J. Barresi
Founder

With our rural northern Maine background, building strong relationships became the cornerstone of Barresi Financial. For 40 years, we have helped businesses and individuals pursue their financial and wealth management goals and have acted as their trusted advisor throughout. Our motto “Expertise with Integrity”, is not just our slogan, it is the backbone of our values and has guided our service for our clients. We have added additional services, dealt with new challenges, regulations and laws, learned new products, and throughout it all, we have always kept the client in the center of what we do and who we are. We take our role as your advisor seriously and expect to be your advisor for the long haul, not just for one transaction.

Over the years, I greatly appreciated working with my clients, watching them achieve their goals, grow their business, or retire with enough income to enjoy their well-earned golden years. I especially liked learning more about their families, hobbies, and their kids and of course we were here for them whenever they suffered a loss and could advise them through difficult times.

One of my great fears was that I would not be able to be there for a client, so I learned that I needed to have a team that can be there when I was not. By bringing the right people on, training them to live and breathe our motto, and giving them space to grow, the firm grew more than I ever could have expected while maintaining our service levels.

The team worked so well, that it allowed me to do something that I never imagined for myself, retire. In 2016 I was able to reduce my schedule and in 2018, I officially retired. I miss the clients and the interactions, but I trust in the team and know that the clients are still in good hands. The firm continues to grow under the new ownership team, it continues to innovate, adapt, and provide advice for our clients. I look forward to the future and the team looks forward to continuing or starting to work with you to achieve your financial goals.

Marcus J. Barresi
Founder

A TRADITION OF EXCELLENCE.

Since we opened our doors in 1979, the evolution to Barresi Financial has been successful due to our constant goal to provide our clients with the highest level of service and products. To accomplish this, we work hard to maintain focus in a fast paced environment by building a professional staff and establishing relationships with other specialty firms to help assure high quality service.

A COMMITMENT TO SERVICE.

We are committed to our client's individual financial success. Unlike companies that offer "standardized" solutions to complex probems we first listen to you and then think objectively in term of how to best meet your specific needs. We work within your existing financial program and will partner with your other professional advisors to develop strategies and solutions that help you achieve your goals.

Our relationship with each client is based on mutual respect and trust. Therefore, we keep our focus on each client's indvidual needs, goals and objectives and work in a collaborative effort to achieve those goals and objectives.

Our clients work directly with a dedicated team of professionals, each of whom offers a specific skill set to address each client's unique financial concerns.

Through our round table process, clients are in communication with their team of specialists and advisors to help ensure that their stated goals and objectives are achieved through a coordinated, multi-disciplined approach.

PERSONAL FINANCIAL VIEW®

Through a holistic planning approach we can help you coordinate a strategy to accomplish your financial objectives. Integral to this wealth management solution is the personalized website and custom account services that Barresi Financial provides.

This technology platform, Personal Financial View ®, puts all of your key financial data and critical documents at your fingertips. We will work with you on strategy, implementation and ongoing monitoring and updates. Here are only some of the features that Personal Financial View ® has to offer.

ACCOUNT CONNECTION

Your account balances and holdings are updated automatically to reflect the values provided by your financial institutions, streamlining the organization and management of your data.

OUR CLIENTS WORK DIRECTLY WITH A DEDICATED TEAM OF PROFESSIONALS, EACH OF WHOM OFFERS A SPECIFIC SKILL SET TO ADDRESS EACH CLIENT'S UNIQUE FINANCIAL CONCERNS.

SPENDING AND BUDGETING

The spending and budgeting area allows you to track your spending and work to create a monthly budget. It allows you to see whether you are overspending your budget or whether you remain on track month to month.

ALERTS & ALARMS

Customization that allows you and your Barresi Financial advisory team to effectively monitor your accounts, ensuring that you are on track to meet your goals.

W W W . B A R R E S I F I N A N C I A L . C O M

OUR CLIENTS AND FINANCIAL PLANNING

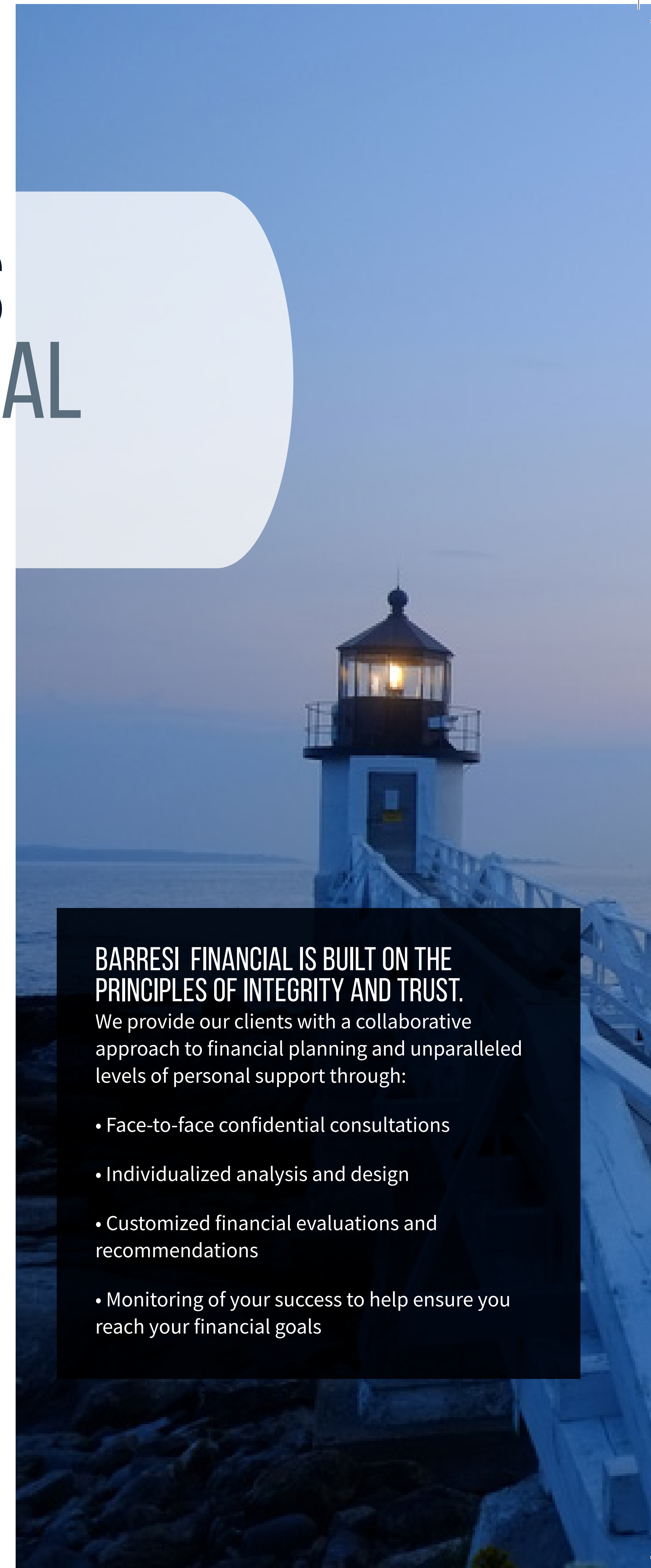
THESE ARE SOME COMMON CHARACTERISTICS OF OUR IDEAL CLIENTS:

- Have other things in their lives that are more important than money, including their family life and their health
- Are committed to implementing a written financial strategy
- Value our opinion and experience
- Enjoy the idea of having all of their assets in one place and one advisor coordinating all financial matters
- They Can Handle the Truth: Our clients want to hear the truth regarding their financial situation, no matter what. Most Important: Wanting and having a trusting and open relationship with a Financial Professional

FINANCIAL PLANNING

My team and I will work with you to design your personalized financial plan.* We collaborate, as desired, with family members, business partners and other financial professionals to help ensure that all pieces come together in the most effective manner. We work with you to implement your financial plan, recommending various strategies and a broad array of financial products for your consideration.

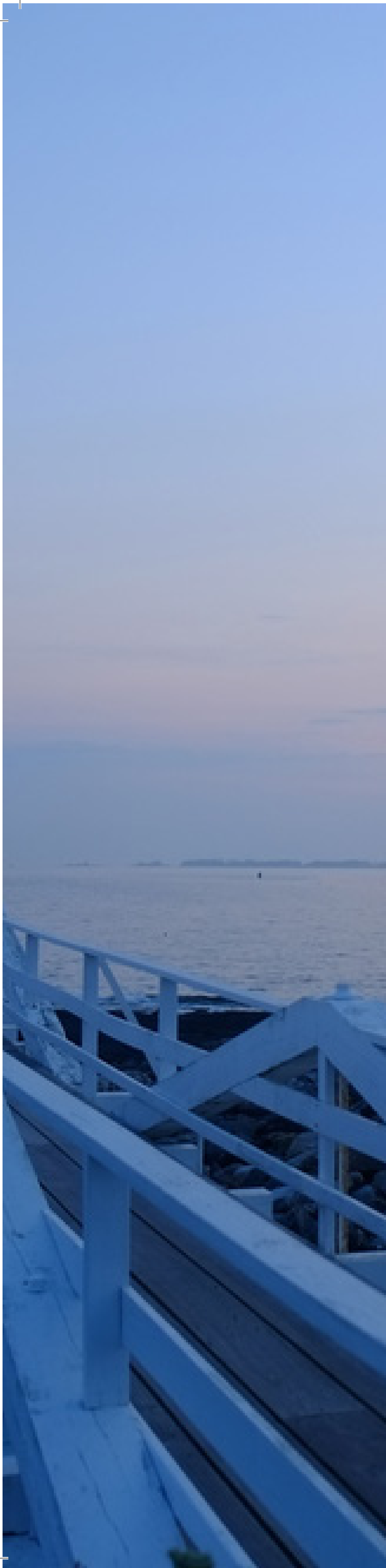
*Please note that you can implement your financial plan at the financial institution of your choice.



BARRESI FINANCIAL IS BUILT ON THE PRINCIPLES OF INTEGRITY AND TRUST.

We provide our clients with a collaborative approach to financial planning and unparalleled levels of personal support through:

- Face-to-face confidential consultations
- Individualized analysis and design
- Customized financial evaluations and recommendations
- Monitoring of your success to help ensure you reach your financial goals



OUR SERVICES

We provide a full array of comprehensive financial services. Feel free to contact us for a complimentary initial consultation or brief introductory conversation to determine how we might partner with you toward achieving your financial goals.

1

INVESTMENT SERVICES

We begin by getting a clear understanding of your overall financial goals and your goals for each investment account. We discuss your investment preferences and concerns, your attitudes toward risk and your time frame for the assets in each account. To implement your various investment strategies, we'll work with you to build appropriately diversified portfolios, with access to the following:

- Wealth Management
- Brokerage Accounts
- Individual Stocks, Bonds, Mutual Funds, and Exchange Traded Funds
- 529 Plans/College Funding Strategies
- Fixed, Variable, and Index Annuities
- Individual, Roth, SEP, and Simple IRAs
- Alternative Investments

2

INSURANCE SERVICES

We discuss with you your general attitudes towards risk, underline various risks and review the options to manage and/or mitigate these risks. We will perform a full policy and beneficiary review, as well as the review of trusts that may own certain policies. We can offer access to the following solutions:

- Long Term Care Insurance
- Life Insurance
- Disability Insurance
- Medicare Advantage, Supplements, and Part D Plans
- Business Income Continuation
- Succession and Estate Planning Strategies

3

EMPLOYEE BENEFITS

We discuss with you your general attitudes towards risk, underline various risks and review the options to manage and/or mitigate these risks. We will perform a full policy and beneficiary review, as well as the review of trusts that may own certain policies. We can offer access to the following solutions:

- Group Insurance (Health, Dental, Disability, Life, Ancillary)
- Qualified Retirement Plans, Pension, and Profit Sharing Plans
- Executive Benefits
- Financial Planning

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