October 7, 2020

Dear Clients,

We are pleased to announce that SAGE Private Wealth Group is now an independent Registered Investment Advisor firm effective October 2, 2020. We are excited about this milestone as we approach our 9-year anniversary on October 27, 2020. This next step in the evolution of SAGE Private Wealth Group has always been part of our business plan. We are proud of the fact that we were able to achieve this milestone in a shorter time-period than originally planned. It is with your continued trust and relationship that we celebrate this milestone with you, our valued clients.

Over the next several months we will be sharing with you, via email and through your Wealth Advisor, more resources available to you as part of SAGE becoming an independent Registered Investment Advisor firm. The following are some of the ongoing and new benefits now available to you:

1) **Access to More Information**: We utilized more integrated tools that allow clients to access more qualitative & quantitative information. These customizable, easy-to-use tools will be at your fingertips to use and provide more transparency to benchmark your individual progress. *Educational Training Sessions coming soon.*

2) **Access to More Choices**: We now have the ability to custody assets with other custodians allowing us to provide more options for clients where more of their specific needs are better fulfilled. *Talk to your Wealth Advisor about what this means for you.*

3) **Increase in Cost Savings:** We are able to do business in a more cost-effective manner as part of becoming an independent RIA and will be passing along some of those savings to you, valued client. *Talk to your Wealth Advisor about what this means for you.*

4) **Fiduciary Responsibility:** As a Registered Investment Advisor, we function with a high fiduciary standard. We have always functioned with this standard for our advisory clients, providing a long-term lifetime mentality of advice philosophy versus a more transactional "in the moment" advice approach. *Talk to your Wealth Advisor about what this means for you.*

On behalf of the entire SAGE Private Wealth Group team, thank you for your continued trust and relationship. We look forward to entering this new chapter together. Stay tuned for more information in the coming months and visit our website for ongoing updates.

Sincerely,

Khaled A. Taha
CEO & Managing Partner

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