OverWatch™

Assess, Confirm and Protect, the Trusted Advisor Way

PRECISION FIDUCIARY ANALYTICS

For Sure
It Is Important You Know Your
FINANCIAL LIABILITY EXPOSURE

40% Corporate Bonds?
20% Large Cap Stocks?
15% Mid Cap Stocks?
15% Foreign Stocks?
10% Small Cap Stocks?
HAVE YOU REDUCED *UNCOMPENSATED RISK*?

Do You Know **- FOR SURE –** If a Portfolio is Prudently Diversified**?**

Failure to meet fiduciary standards for *"prudent and reasonable reduction in uncompensated risk"** could result in the fiduciaries being held financially accountable. If you or a client serves as a fiduciary responsible for overseeing, directly or indirectly, an investment portfolio, you cannot afford not to know.

Find Out - **FOR SURE -** Your Financial Liability Exposure

With just a few minutes of your time to complete a simple worksheet, we'll screen your portfolio and provide you with a report that will tell you whether your portfolio meets the fiduciary standards for the *prudent & reasonable reduction in uncompensated risk*.* Finding out couldn't be easier, and there's no obligation or cost. Get your liability-exposure-screening from Precision Fiduciary Analytics.

What to Do:

1) Download the Excel worksheet (symbols & % of portfolio only; no total value needed)
2) Follow the instructions
3) Secure your Uncompensated Risk Screening in 3 business days

It's that easy to find out **FOR SURE**!!

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*"In understanding a trustee's duties with respect to the management of risk, it is useful to distinguish between diversifiable (or "uncompensated") risk and market (or non-diversifiable) risk that is, in effect, compensated through pricing in the marketplace. Failure to diversify on a reasonable basis in order to reduce uncompensated risk is ordinarily a violation of both the duty of caution and duties of care and skill." RESTATEMENT OF TRUSTS 3rd VOL. 8 1992 *Added Note: Most Error and Omission Insurance Policies do not cover fiduciary breach of duties.*

Precision Fiduciary Analytics
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