



Statement of Purpose

Our Client Promise.

As the only *Life Cycle*[™] Wealth Management Company, BOULEVARD Wealth Management, Inc. is committed to a fiduciary standard and works to improve the outcomes of its clients. Our Mission, Vision and Values speak to this commitment and guide our daily work.

Mission

We faithfully steward the financial resources of our clients, helping them achieve their financial objectives and maintain their financial security.

Vision

Leadership. Provide leadership to the financial services industry in the areas of written, strategic financial planning and risk management.

Assistance. Assist our clients in understanding their own circumstances, setting goals, and achieving the low-worry financial life we all deserve to live.

Development. Promote the excellent decision-making requisite to our clients achieving lasting wealth in their lifetimes and a legacy for future generations.

Values

Excellence. We are committed to excellence. We strive to continually improve the client experience and increase the probability of our clients achieving their goals.

Integrity. We will act with integrity and honesty in all situations, fully disclosing all fees and ensuring clients clearly understand the fee structure and believe they are receiving fair value for those fees. We will always act in the best interest of our clients recommending strategies that best meet their needs and help them reach their goals as efficiently as possible.

Service. We strive to deliver beyond our clients' expectations and so will persist to achieve a complete resolution in every client service situation.

www.boulevardwealth.com

Boulevard Wealth Management, Inc., A Registered Investment Advisor
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