How our “Plus” in TAMP+ Gives Advisors a Winning Edge

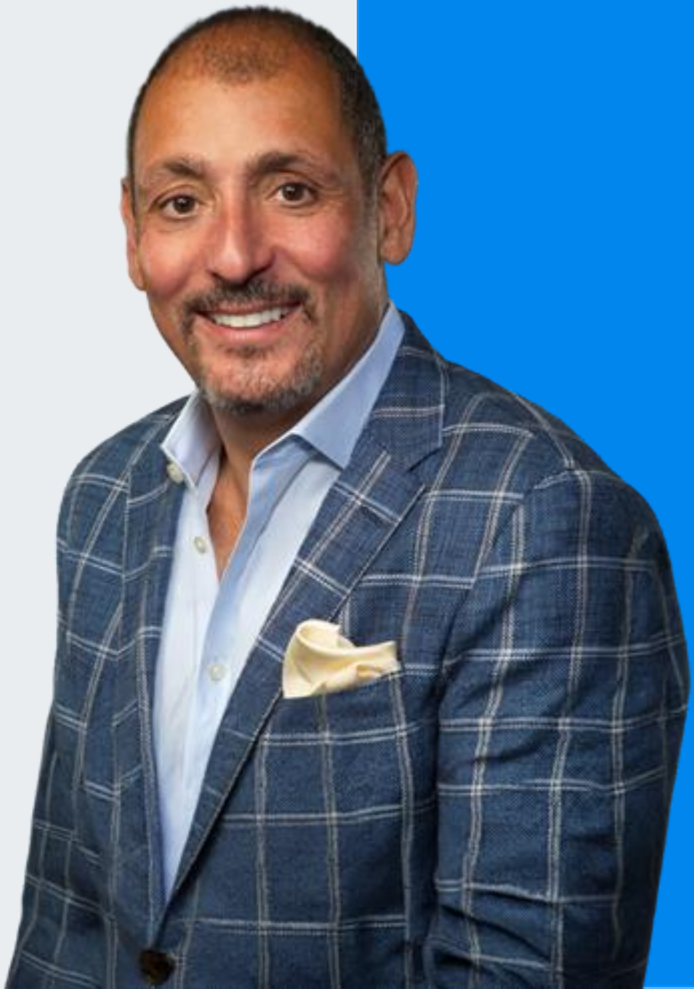
BROOKSTONE
CAPITAL MANAGEMENT®

Turnkey Asset Management Platform+

Meet The Founder & CEO

DEAN ZAYED

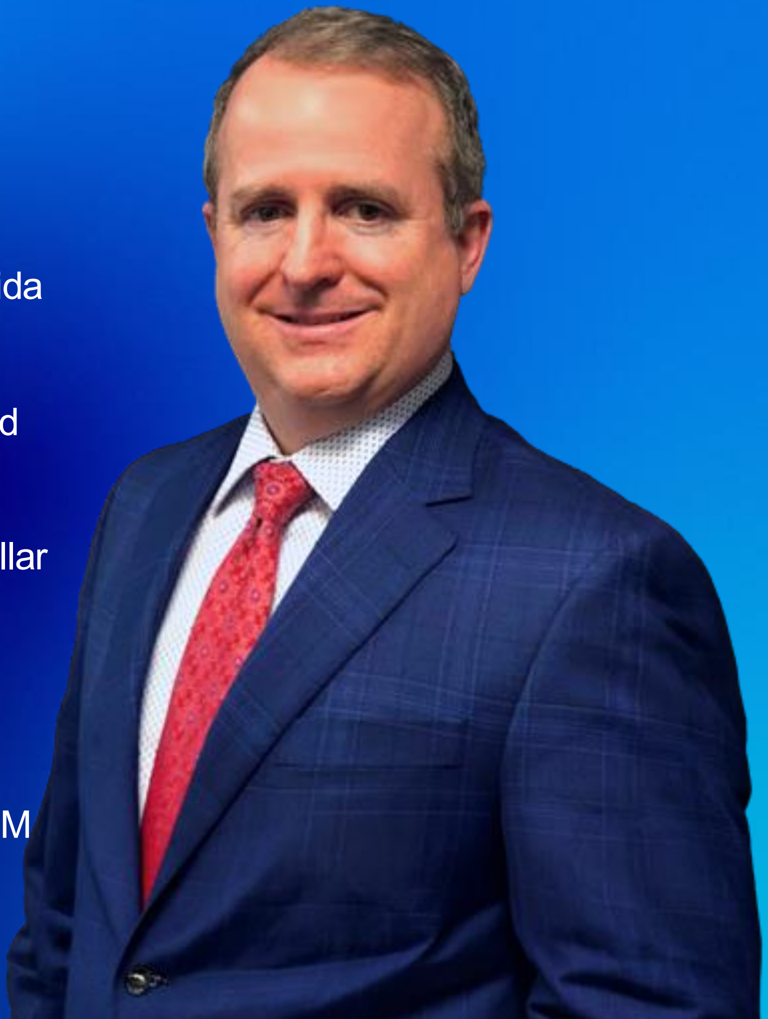
- Bachelor's in Economics from Northwestern University
- Juris Doctor from Northwestern University
- Masters, Taxation, Chicago-Kent College of Law, CFP®
- Founded a private wealth management firm, Prizm Financial, and estate planning law firm, Perkins & Zayed
- Member of the MDRT and Top of the Table
- Featured as a financial expert on CNBC, Fox Business, Bloomberg, and The Street



President

DARRYL RONCONI

- Bachelor of Science in Finance from University of South Florida
- Master of Science from DePaul University
- Former COO of Genworth Financial's Broker/Dealer, RIA, and Insurance Agency overseeing all aspects of each firm
- Founded and ran a FinTech firm that created multi-million-dollar software platforms for Fortune 500 companies within the Financial Services industry
- Instrumental in the growth of Genworth's BD/RIA from 200 Advisors with $1B AUM to over 2,400 Advisors and $16B AUM



About Brookstone

$14B AUM

Wealth Advisor

Best Technology

Best Model Marketplace

Best Advisor Development

Best Service

Over 600 Active Advisors

Over 150 Employees

A dedicated team to better serve every aspect of your practice.

*In **addition**, now let me tell you the value **add** of our TAMP**+** that make us…*

…a TAMP like no other

4 Unique & Impactful Areas of Business Development Support:

Media Strategy & Production

Red Carpet Service

Lead Generation & Client Acquisition

Brookstone Growth Consulting

Media Strategy: Video Marketing

Increasing your brand awareness through professional content

- **One on one program production video marketing** support and direction from Emmy Award winning anchor
- **Custom content** and script writing
- **Paid media** produced for you and distributed to millions of viewers
- **Holistic TV show** – both RIA and FMO focused
- **Broadcast quality** content to local advisors with proven strategies
- **Earned media** for advisors on local news networks

Media Strategy: National Brand Growth

Turning media opportunities into advisor growth

- **Brookstone Video Podcast -** advisor and consumer-facing media designed to elevate visibility, credibility, and thought leadership
- **National Media Opportunities -** positioning advisors as trusted financial experts across national media platforms
- **Digital & YouTube Strategies -** scalable content models to expand advisor visibility and reach
- **Executive Media Training & On-Camera Coaching -** personalized advisor guidance to convert media opportunities into client growth

Media Production & Strategy

Red Carpet Service

Lead Generation & Client Acquisition

Brookstone Growth Consulting

Lead Generation & Client Acquisition: Retirement Wealth Academy

RETIREMENT WEALTH ACADEMY

Exclusive Turnkey Lead Generation Program

- Taught by Advisors at local colleges & libraries
- Lead generation thru Facebook advertising program
- Advisor Dashboard to track registrations to appointments

Compelling Course Materials that Fill the Room

Exclusive content:

- *New Reality in Our Retirement* (1 or 2 day)
- *Retire Ready*
- *Retirement without Surprises* ***(NEW)***
- OR use your own course/slides!

Media Production & Strategy

Red Carpet Service

Lead Generation & Client Acquisition

Brookstone Growth Consulting

Dedicated, Proprietary Consulting Team: Brookstone Growth Consulting (BGC)

Professional consulting and strategies to grow your practice

- Professional advisor coaching on growth & communication challenges via mainstage, masterclasses and one-on-one advisor sessions
- Custom advisor consultations provided to advisors to meet their unique goals, and that play to their strengths.
- Consulting On-Demand Video Library: Instant access resource for help on organic growth – COIs, Client referrals, client events & top client retention and critical communications challenges on topics (Fee Discussion).
- Content that helps advisors overcome the plateau

BROOKSTONE
GROWTH CONSULTING

Media Production & Strategy

Red Carpet Service

Lead Generation & Client Acquisition

Brookstone Growth Consulting

Red Carpet Service: Client Concierge

- Dedicated advisor liaison serving as extension of advisor office and connection to Brookstone TAMP+ Resources
- Proactively provide book of business optimization
- Help advisors find and move unmanaged and unbilled assets to billable models, aligned with the client's long-term goals.
- Identify & present improvement areas solutions for assigned Advisors' operations, processes and sales
- Assist leading special projects, including planning, research & analysis

What Advisors are Saying

Brookstone TAMP+ is a PARTNER... not a PLATFORM

- *“Billable AUM has increased significantly since we started meeting with the Concierge team. Our unmanaged sleeve has been cleaned up and decreased”*
- *"It allows me to be a better advisor..."*
- *"Most important strategic partner..."*
- *"They set you up for success..."*
- *"Vested in your practice growth..."*
- *"So easy and so fun to scale up business..."*
- *"A true partnership..."*

What Advisors are Saying

"It's a partner not a platform"

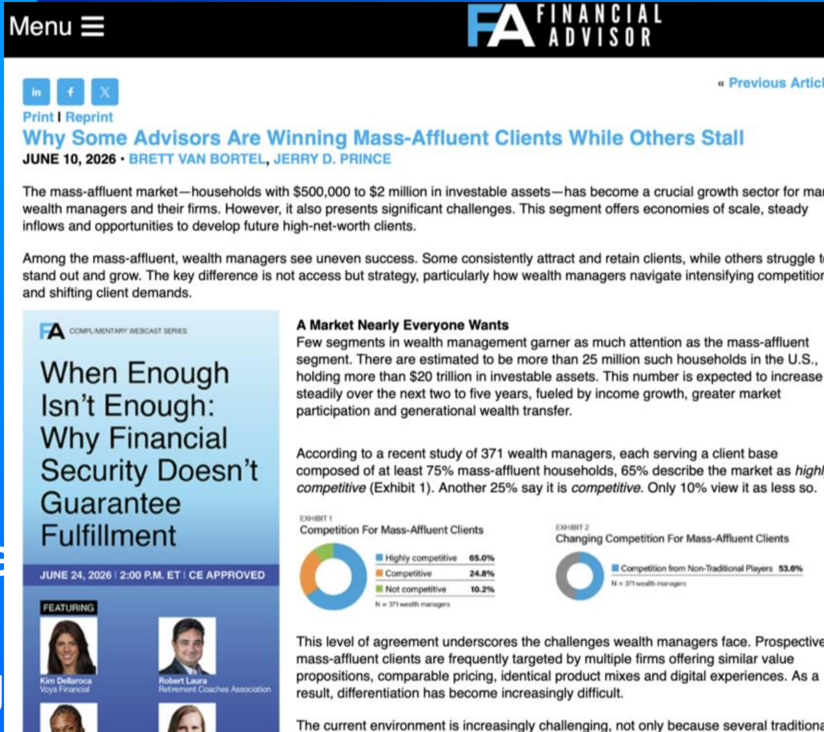
"Billable AUM has increased significantly since we started meeting with the Concierge team. Our unmanaged sleeve has been cleaned up and decreased"

– BCM Top Advisor

Media Strategy & Production

Red Carpet Service

Brookstone Growth Consulting



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FINANCIAL ADVISOR

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Why Some Advisors Are Winning Mass-Affluent Clients While Others Stall

JUNE 10, 2026 • BRETT VAN BORTEL, JERRY D. PRINCE

The mass-affluent market—households with $500,000 to $2 million in investable assets—has become a crucial growth sector for ma wealth managers and their firms. However, it also presents significant challenges. This segment offers economies of scale, steady inflows and opportunities to develop future high-net-worth clients.

Among the mass-affluent, wealth managers see uneven success. Some consistently attract and retain clients, while others struggle t stand out and grow. The key difference is not access but strategy, particularly how wealth managers navigate intensifying competitio and shifting client demands.

A Market Nearly Everyone Wants

Few segments in wealth management garner as much attention as the mass-affluent segment. There are estimated to be more than 25 million such households in the U.S., holding more than $20 trillion in investable assets. This number is expected to increase steadily over the next two to five years, fueled by income growth, greater market participation and generational wealth transfer.

According to a recent study of 371 wealth managers, each serving a client base composed of at least 75% mass-affluent households, 65% describe the market as *highl competitive* (Exhibit 1). Another 25% say it is *competitive*. Only 10% view it as less so.

This level of agreement underscores the challenges wealth managers face. Prospective mass-affluent clients are frequently targeted by multiple firms offering similar value propositions, comparable pricing, identical product mixes and digital experiences. As a result, differentiation has become increasingly difficult.

The current environment is increasingly challenging, not only because several tradition

The PLUS Adds Meaningful Results

How to make a plus (+) a multiplier (X) for your practice

72%
increase in TV viewers

2-3x
engagement on social platforms

>80%
lead conversion rate on social platforms

20%
increase in billable **AUM** at advisor level

Professional Coaching & Content to **accelerate your growth**

Hundreds of millions generated in **AUM** through RWA

Thank You!

BROOKSTONE
CAPITAL MANAGEMENT®