# Exciting News from Matthew Blocki

Thank you for reaching out to us! As we mentioned in our phone call, my team and I are delighted to announce that we have transitioned the firm to be an independent wealth management firm, EWA, LLC dba Equilibrium Wealth Advisors (EWA). We made this move to put you in a stronger and more flexible position to achieve your financial goals. Additionally, this step will allow us to continue to live out our three C's:

- Being a **catalyst** in affirming complex financial decisions
- Being a **CFO** to whom you (the CEO) delegate the execution of your planning and wealth management
- And most importantly, providing you with **concierge** services.

As an independent firm, we are no longer limited to a specific financial services provider and now have a broader range of investment options at our disposal. These new resources have dramatically increased our ability to design and implement customized financial strategies that will help you meet your specific goals. Our shift has enhanced our ability to fulfill your needs and to provide you with the exceptional service you require and deserve. EWA's highest priority is to provide you, our client, with the best value in the context of transparency.

As always, we strive to help you keep your life in balance. Your life is complex, with varied responsibilities and interests pulling you in many directions and competing for your time. We are here for you with an integrated, stress-free approach to help you focus on your current and future goals related to financial planning, investments, retirement and wealth management. Most importantly, we hope to continue to quarterback all your financial decisions to maximize the only non-renewable resource (your time).

You may have questions about this transition and we look forward to meeting with you soon. Please see the checklist below with next steps on how to formalize the transition to our new firm. Should you have any questions in the meantime, our Frequently Asked Questions will provide some additional information that will help explain what this transition means for you.

Here are our responses to some additional questions our clients have asked:

- How do I continue to work with EWA?
- How will the transition benefit me as a client?
- Why did you leave your prior firm?
- Will my experience at EWA be the same after the transition?
- Will my fee be different at the new firm?

Warm regards,

Matthew Blocki

Founder and CEO
Wealth Management Advisor
EWA, LLC

EQUILIBRIUM WEALTH ADVISORS

# WELCOME TO EWA

**We want to ensure your transition to EWA is smooth! See below for steps on how we will make this happen.**

## STEP 1:

Call with our team to provide personal information to open your account — we will be in touch!

## STEP 2:

After the call, you will be sent a **DocuSign email** to complete the following:

- [ ] Sign an Account Application — this is to open new account(s) at Fidelity®.
- [ ] Sign our Wealth Management Agreement — this is an agreement to let EWA, LLC (us) manage your accounts.
- [ ] Attach a void check — this is to link your bank account with your accounts (so you can send and receive money). The DocuSign email you receive will prompt you to upload a picture.

## STEP 3:

You will receive a letter our legal team wrote on your behalf. This is an ***optional*** letter to send to Northwestern Mutual requesting a release of your personal files still living on Northwestern Mutual's database to EWA, LLC. This will allow us to continue your planning without a hitch.

- [ ] Electronically Sign the Letter Attached
- [ ] Email it to Matt Blocki at mattblocki@ewa-llc.com

**Equilibrium Wealth Advisors | 412.288.2363 | info@ewa-llc.com | EWA-LLC.com**

EWA, LLC dba Equilibrium Wealth Advisors, is an SEC-registered investment advisory firm providing investment advisory and financial planning services to clients.

Securities are offered through Fidelity Brokerage Services LLC and National Financial Services LLC (collectively, "Fidelity"), member FINRA/SIPC. Investments in securities and insurance products are not insured by any state or federal agency.

**Contact Us**

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