A Future of Fullfillment

Securing your dreams takes effort and energy, leaving little time for wealth management. We can take that responsibility off your hands while helping you work toward your goals. While working with Lamkin Wealth Management, you will enjoy the confidence that comes from knowing that one of the leading wealth management companies in the country is handling your plan.

Since 1991, we have been helping our clients work toward financial security with our personalized approach to wealth planning, accumulation, and preservation.

Our primary goals are to help you maintain the standard of living you deserve, preserve your wealth, and allow you to live your dreams. To achieve this, we will build and maintain a well thought out "financial life plan." We will focus on you, your wants, and needs. Then we will work together to create a financial blueprint to utilize money as a tool to work toward reaching your dreams.

Along the way, you will work with Mark Lamkin, one of the top advisors in our region. Mark's leadership in the industry provides our team the ability to get the information needed to help you make decisions.

Since 1991, I have been providing financial advice to clients with my personalized approach to wealth planning, accumulation, and preservation.

Pursue Pleasure

Our Seamless Proactive Approach strives to ensure that your investments will keep pace with the changes in your life.

Seamless Proactive Services (SPS®)

Wouldn't you rather be playing the back nine at Pebble Beach or flying to that special sun-soaked island than dealing with multiple service companies? Our seamless proactive approach to client service is all about saving time and worry. This unique structure means we can work on meeting your financial investment needs while eliminating the complexities associated with working with more than one company.

The Lamkin Wealth Management service approach is supported by a full team of professionals that will work hard to help you work toward your personal financial goals. As you can see, we offer a full range of services, but regardless of which service you choose, we will review your portfolio **proactively, anticipating your needs before you do**. This process is designed to ensure that your investments keep pace with the changes in your life.

We Offer:

- Wealth Planning
- Trust Services
- Tax Planning
- Estate Planning
- Risk Management Planning
- Small Business Planning
- Insurance Planning

Release Financial Worry to Fully Embrace Life

We can help maximize the amount of free time you so richly deserve.

There's no time like the present to prepare for those long-awaited days pursuing your passions, whether it's learning to play golf or nurturing your grandchildren. We can help you maximize the amount of free time you so richly deserve. By working with us now, we can arrange all the details that will affect your financial future, sparing you and/or your loved ones from having to make difficult decisions later. As your financial consultant, LWM finds the best team in the industry to work for you. So that you can enjoy life.

Wealth Planning
This is where our specialists in tax, asset allocation, investment research, and estate distribution develop a comprehensive accumulation and preservation plan that best meets your needs and goals.

Trust Services
We provide access to comprehensive trust services customized to meet your individual needs through a trust company known as The Private Trust Company, N.A., an affiliate of Linsco Private Ledger Corp. From Revocable Trusts, Charitable Remainder Trusts to Irrevocable Life Insurance Trusts, the Private Trust Company provides the following services:

Administration

Tax Impacts/Reporting

Compliance Matters

Fiduciary Accountability

Tax Planning
Which is more important: What you earn or what you keep?

Tax planning is critical to your success. Our strategic relationships with Louisville's finest CPA's provide the best tax planning in our area or Lamkin Wealth Management can work with your existing tax advisor to develop and implement strategies that allows you to pay your fair share....and not a penny more!

Your Greatest Gift to Your Children is Your Legacy

Establishing an estate plan can be one of the most effective ways of providing for your family and having a legacy for the future.

Estate Planning

We want you to make the right decisions for your financial future. <u>You can't afford to make costly mistakes!</u> Furthermore, financial management is more than dollars and cents...it's becoming part of the Lamkin Wealth Management family. As part of this family, you will have the opportunity to participate in many LWM events. From meeting industry professionals, attending workshops, to enjoying social events, LWM provide functions which you can bring your family and friends in order to grow together.

We offer the following estate planning services:

- Coordinate with your attorney to implement your estate plan from beginning to end.
- Retitle assets to reduce or eliminate estate taxes
- Retitle assets to avoid probate
- Bi-annual estate planning reviews

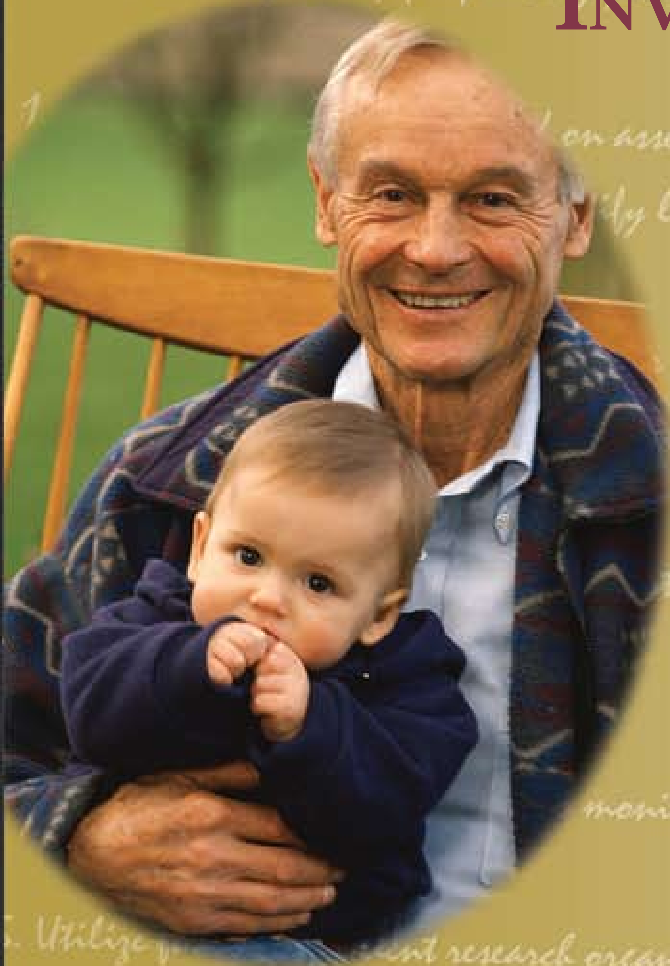
Risk Management Planning

Our risk management team will evaluate your non-financial risks, such as umbrella coverage, long-term coverage, life coverage and medical coverage to be sure the unexpected does not put a halt on your future retirement.

Small Business Planning

Our business planning professionals will consult with you to evaluate or establish employee retirement plans, as well as executive compensation and business buy-sell/continuity strategies. We will meet with you and/or the key team member of your organization, on a complimentary basis, to explore how we can best meet your needs.

Lamkin Wealth's 5-Step Investment Management Process



The Lamkin Wealth Management investment philosophy revolves around an investment process. We believe that by managing money in a defined system, we can help control risk and possibly enhance returns. Lamkin Wealth has developed our five step proprietary process to help achieve your goals. Our five step process is as follows:

1. Create model portfolios based on asset classes believed to be in a long term up trend. We understand short term anomalies occur; however, we identify long term trends and we position our clients in front of the trends.

2. Implement an investment process for our clients. We will not buy investments that are chosen at random and simply hope for the best. We will not buy on tips nor rumors.

3. Monitor fund performance on a quarterly basis seeking to optimize returns based on their holdings, returns, ranking, and correlation to each other.

4. Use an independent watch list to monitor our funds, stocks and best in class investment vehicles.

5. Utilize four independent research organizations to monitor material changes within stock and funds. These firms enhance our investment entry and exit decisions. (Value Line Investment Survey-Professional edition, Standard & Poors, Morningstar, and CDA Weisenberger)

To enrich our clients' lives by developing their personal blueprint that works toward allowing each client to achieve true wealth. By providing proactive wealth solutions, we anticipate needs before they arise and help our clients stay in control of their financial future.

Retirement

Re.tire.ment (noun) 1. The Act of retiring 2. The state of being retired 3. Withdrawal from one's occupation 4. Withdrawal into privacy or seclusion

Does that really describe what you are trying to achieve?

We don't believe in retirement per se', we believe in helping our clients "change their lifestyle" to achieve their dreams.

Lamkin Wealth Management (LWM) will help you redefine traditional retirement. Whether you're preparing for retirement or are concerned about your current situation, LWM can help. We don't believe in retirement per se', we believe in helping our clients "change their lifestyle" to achieve their dreams. Living your life to the fullest and leaving your legacy takes time, energy, and effort. This may leave little time for Wealth Management. You can't afford to make a mistake. At LWM, we provide world class wealth management that will enable you to seek your goals with clarity and make informed, confident decisions regarding your financial plan.

At LWM, you will enjoy the confidence of knowing that your firm is supported by the largest independent research organizations in the industry.

With access to timely, detailed information, computer modeling tools, and market intelligence, we can make informed decisions that can help you avoid costly mistakes and enable you to live your life to the fullest.

Our main difference: Unlike the majority of brokerage firms in the country, Lamkin Wealth Management works as an independent office of Linso Private Ledger, the largest independent firm in the country. That means no conflicts of interest are imposed by the constraints of proprietary products, investment banking relationships or other activities that are inconsistent with your needs. LWM can utilize the best managers in the industry and put them to work in a financial plan that is tailored specifically to you.

Lamkin Wealth Management

Lamkin Wealth Management

At Lamkin Wealth Management you will work hand-in-hand with your personal wealth advisor to develop your goals. Providing support and expertise to your personal wealth advisor is a highly qualified team of specialists. Through in-house strategic alliances, we can handle every aspect of your financial plan.

Leading the team is Mark Lamkin, President and CEO of Lamkin Wealth Management. Regarded as one of the leading planners in our area, Mark's numerous distinctions include being hand picked by Donald Trump to appear on NBC's *The Apprentice*, receiving LPL's Chairman's Club Award which is presented to only the top 5% of LPL planners in the country based on revenue, and being the #1 planner at his previous brokerage firm for nine consecutive years.

Mark's leadership at Lamkin Wealth Management as well as his extensive education and experience provides our team the ability to get critical information needed to help you make the right decisions for your financial future.

Lamkin Wealth Managemnet was ranked in the Top 10 High Net Worth Advisors in Louisvillle. Business First 2007

WEALTH PLANNING. WEALTH ACCUMULATION. WEALTH PRESERVATION.

LAMKIN WEALTH MANAGEMENT

Mark T. Lamkin, MBA, RFC

Mark T. Lamkin
President & CEO
Lamkin Wealth Management

Mission of the Firm:

To enrich our clients' lives by developing their personal blueprint that allows each client to seek true wealth. By providing proactive wealth solutions, we anticipate needs before they arise and help our clients stay in control of their financial future.

Master's in Business Administrative MBA
Bellarmine University

Bachelor's in Finance from University of Louisville

Invested over $1 Billion in client funds over last 16 years

#1 Investment Consultant for previous broker dealer for nine consecutive years

Registered Financial Consultant

Chairman's Club member at LPL - Top 5% of advisors in the nation based on revenue

Licenses: NASD Series 6, 7, 24, 63, 65 and Life & Health

Through our affiliation with LPL Financial Services, our firm represents 8,000 representatives and manages nearly $100 Billion in assets

Named Top 10 Wealth Advisor 2007 - Business First

Our Vision:

To enhance our clients' lives by providing the blueprint to achieve their goals, live their dreams, and enrich the world through their legacy.

Unique Features of our firms:

As an independent office, Lamkin Wealth Management does not have the typical conflicts of interest found in most financial planning firms. We offer no proprietary products, have no investment banking relationships and only utilize best in class money mangers for our clients.

Board Member
WHAS Crusade for Children
Audubon Country Club
Children's Hospital Foundation
Executive Board Bellarmine School of Business
Donald Trump Apprentice - Contestant Season Four
Member of Hand in Hand Ministries
Member Little Flock Baptist Church

LAMKIN WEALTH MANAGEMENT