

Client Name _____

Date _____

TODAY – 24 MONTH

FUTURE

A
Vital

A
Vital

B
Important

B
Important

C
Nice

TRADITION
wealth management

C
Nice

TRADITION
wealth management

D
Worthless

D
Worthless

Tradition Wealth Management, LLC
7601 France Avenue South, Suite 100, Edina, MN 55435

Client Name _____

Date _____



TRADITION
wealth management

Securities offered through ProEquities, Inc., a Registered Broker/Dealer, Member FINRA/SIPC.
Investment Advisory Services offered through Tradition Wealth Management, LLC, a Registered Investment Adviser.
Tradition Wealth Management, LLC, is independent of ProEquities, Inc. ProEquities, Inc. is not affiliated with Tradition Capital Bank (TCB).
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