We are committed to our clients' financial welfare

northbend
WEALTH MANAGEMENT

our COMMITMENT

We are committed to your
FINANCIAL WELFARE.

WE TAKE A HOLISTIC APPROACH,
tying your financial objectives directly
to your life goals.

We strive to **UTILIZE ALL
OF OUR AVAILABLE RESOURCES**
to help you pursue your goals.

Our energy, commitment and
efforts are **FOCUSED ON YOU,
THE CLIENT.**

We are committed to being a valued member
of your team of professional advisors to bring a
COMPREHENSIVE, WELL-THOUGHT-OUT PLAN.

our
SERVICES

Finding your path . . .

Life takes us down different paths, and each path requires a different strategy. Our clients receive our undivided attention—from planning to implementation and staying in touch. We take a holistic approach when developing your plan so that you are prepared throughout the twists and turns of life.

Everyone encounters challenges along the way, but we work hard to anticipate and address those situations as they arise. We want to keep you on track and strive to protect your financial welfare.

INVESTMENTS

- Annuities
- Certificate of Deposits
- Equities/Stocks
- Exchange-Traded Funds (ETFs)
- Fixed-Income Bonds
- Mutual Funds
- Options
- Unit Investment Trust

FINANCIAL PLANNING

- Investment Planning
- Tax-Sensitive Investing
- Educational Planning
- Retirement Plans
- Wealth Management
- Bank/Lending
- Institutional Consulting

INSURANCE

- Leaving a Legacy
- Protecting Your Family
- Transitioning a Business

managing PARTNERS

MARC DECICCO

Marc has nearly 25 years of experience in the financial services industry, beginning his career at Wheat First Butcher Singer, now Wells Fargo Advisors. His focus is helping his clients meet their financial goals by developing customized investment plans around their needs and risk tolerance. Marc has experienced many economic and market cycles over his career; this has given him the well-rounded experience to assist clients to best plan for life events.

Marc recognized that he had a passion for finance when he had the opportunity to complete an internship in the corporate finance department of Standard & Poor's in New York City. Realizing that his passion would be serving clients and helping to make a difference in their lives, rather than working behind a research desk, Marc became an advisor in 1996. That desire to positively impact the lives of his clients has sustained his enthusiasm and commitment to this profession for a quarter century. Forming his own independent firm, North Bend Wealth Management, alongside his longtime business partner Tad Wilson, has allowed Marc to provide broader investment options, improved enhanced technology and best-in-class service with the support of LPL Strategic Wealth Services.

Marc received his undergraduate degree from West Virginia University and is still an avid WVU sports fan. He is active in his local community and has served on the board of multiple organizations. Marc and his wife Stacy reside in Mineral Wells and have two grown children. In his spare time, Marc enjoys spending time outdoors, traveling with his family, live music shows, and has recently become a student of the game of golf.

We have been financial professionals our entire career and are deeply passionate about what we do. Many people struggle to map out a path to their financial future, wondering if they've planned for every contingency and whether they will outlive their money. We are confident that with our understanding and knowledge of personal finance, coupled with our training and experience as financial professionals, we can help you better prepare for the future.

TAD WILSON

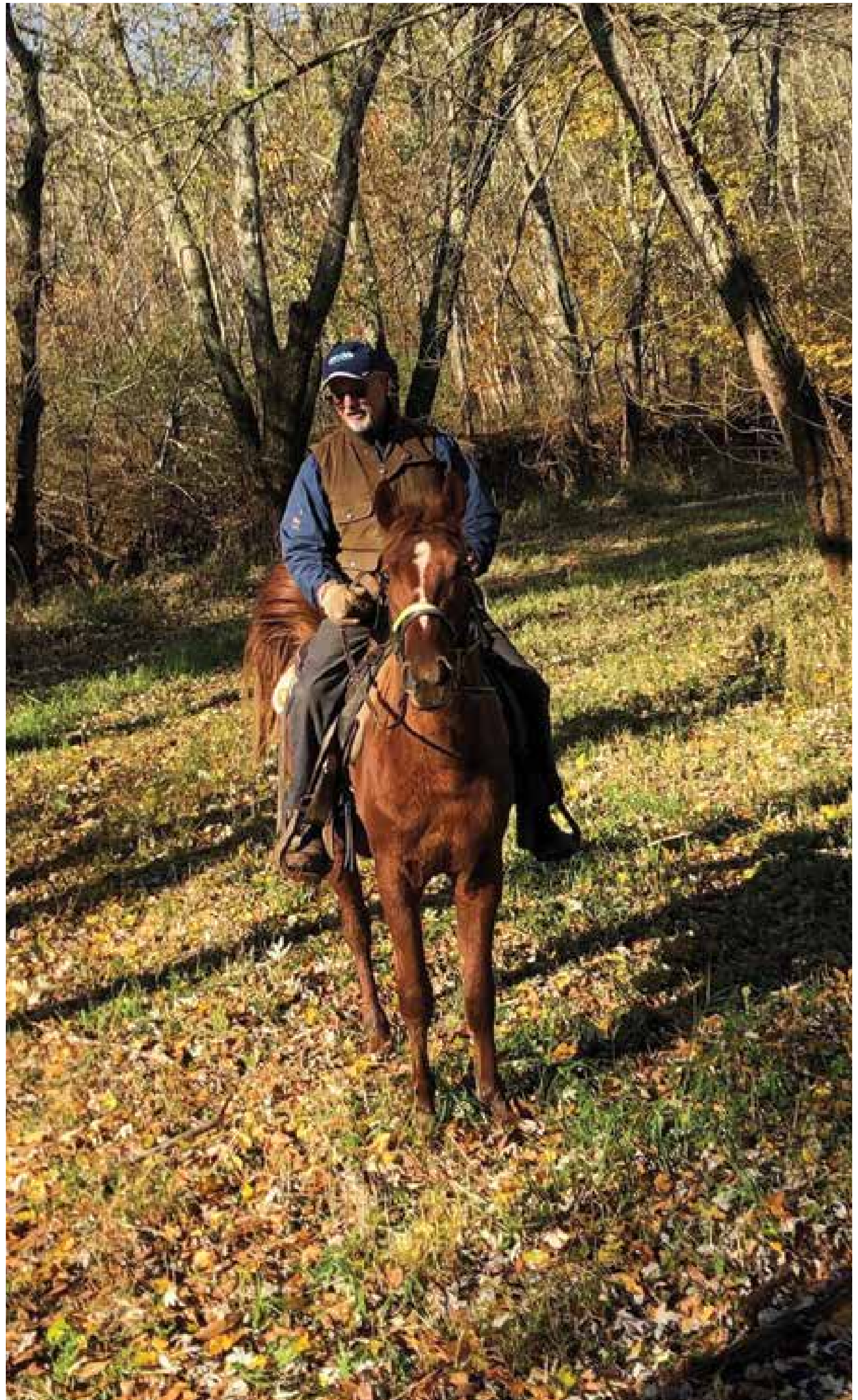
With 35 years of experience in financial services, Tad is dedicated to helping individuals, small businesses, and institutional clients. Over the years, he has experienced major shifts in the markets. This experience enables him to help clients structure customized portfolios to address their specific financial goals. The launch of his independent firm, North Bend Wealth Management, alongside his partner, Marc DeCicco, will allow Tad to provide broader investment options, improved technology and high touch service with the support of LPL Strategic Wealth Services.

Tad began his career in financial services in 1985 as a Financial Advisor with Prudential Bach & Company. While attending graduate school and taking financial investment courses, he knew the advisory business was going to be his career. Tad joined Wells Fargo Advisors in 1991 and met Marc DeCicco in 2007. Throughout his career, Tad has been committed to building personal, long-term client relationships. He focuses on developing individualized financial plans for clients that are preparing for retirement or are already in retirement.

Tad earned his undergraduate degree from Marshall University and obtained a Master's degree in Business from West Virginia University.

Committed to helping his community prosper, Tad is active with Wood County Society, a non-profit organization that helps young adults with disabilities. Tad is also active with United Way of Mid-Ohio Valley. He served on the Board of Education for ten years and was Board President of the Consumer Credit Counseling Board, serving for twenty years. Away from the office, he and his wife, Kathy, own and operate a horse boarding facility, Wilson Valley Stables, in Wood County. Together, they have five children, three dogs, two cats, and two horses. Tad, a native of West Virginia, enjoys horseback riding, golfing, traveling, and spending time with his family.

our BRAND STORY



northbend WEALTH MANAGEMENT

If you are familiar with West Virginia, you likely know our beautiful state park, North Bend. Tad enjoys riding his horses along the 72-mile trail that runs along the historical B&O railroad, while Marc enjoys biking along it. The trail is named for the horseshoe curve of the North fork of the Hughes river. It is also known for the sharp bend in the river forming the three sides of the park boundary. This is a place to relax, enjoy the outdoors, and make memories with family and friends—possibly finding your true north. The fork in the river can represent the forks in the road of life that we all face. Throughout life, you try to follow along the straight path, knowing what is in front of you—like the path of the historic B&O railroad—but sometimes you come upon a fork in your path and have to change your course. North Bend Wealth Management is here to guide you along the straight path and the forks that come unexpectedly in your path through life.

For our entire career, we have had a passion for doing the right thing and helping our clients when they hit that fork in the road. North Bend represents both the straight path and the change of course. That symbolism, right here in our own backyard, really resonated with us.

WE'RE HERE FOR YOU

Our path in life delivers both the expected and unexpected. And it's important to be ready for both.

That's why we take a holistic approach.

We customize an investment path to help you reach your financial goals so that when the peaks and valleys of life come your way, you're ready.

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