

Why Invest?

Get Your Finance in Order

- Retirement plans: 401K, 403b, IRA, SEP/SIMPLE
- Taxable brokerage accounts: Fidelity, Schwab, TD Ameritrade, Etrade, ...
- Children college education 529
- Life insurance VULs investment accounts
- Deferred compensation plans

Miracle of Compounding

\$10K from 12/31/2000 to 2/4/2010: Intel 401K Tactical Asset Allocation Moderate vs. Vanguard Balance Fund Index (VBINX) (\$10K grows to \$25k vs. \$13K)



Like getting an extra 10% (\$100k account) raise every year for a person with \$100k annual salary!

Why Evergreen Plans Solutions

- Thousands of retirement plans are in disarray!
 - "Everyone I knew at HP was deciding randomly where to invest." How good is your 401(k)?
 - Professional help comes with hefty fee, *but with unrewarding performance*
- Our missions
 - Applies wealth management strategies only seen in institutions or high net worth investment.
 - Low cost: flat low fee
 - Total customization: both plan specific and personal risk tailored.
 - Ease of use: half an hour a month/a quarter

Why Evergreen Plans Solutions

Time Proven Strategies

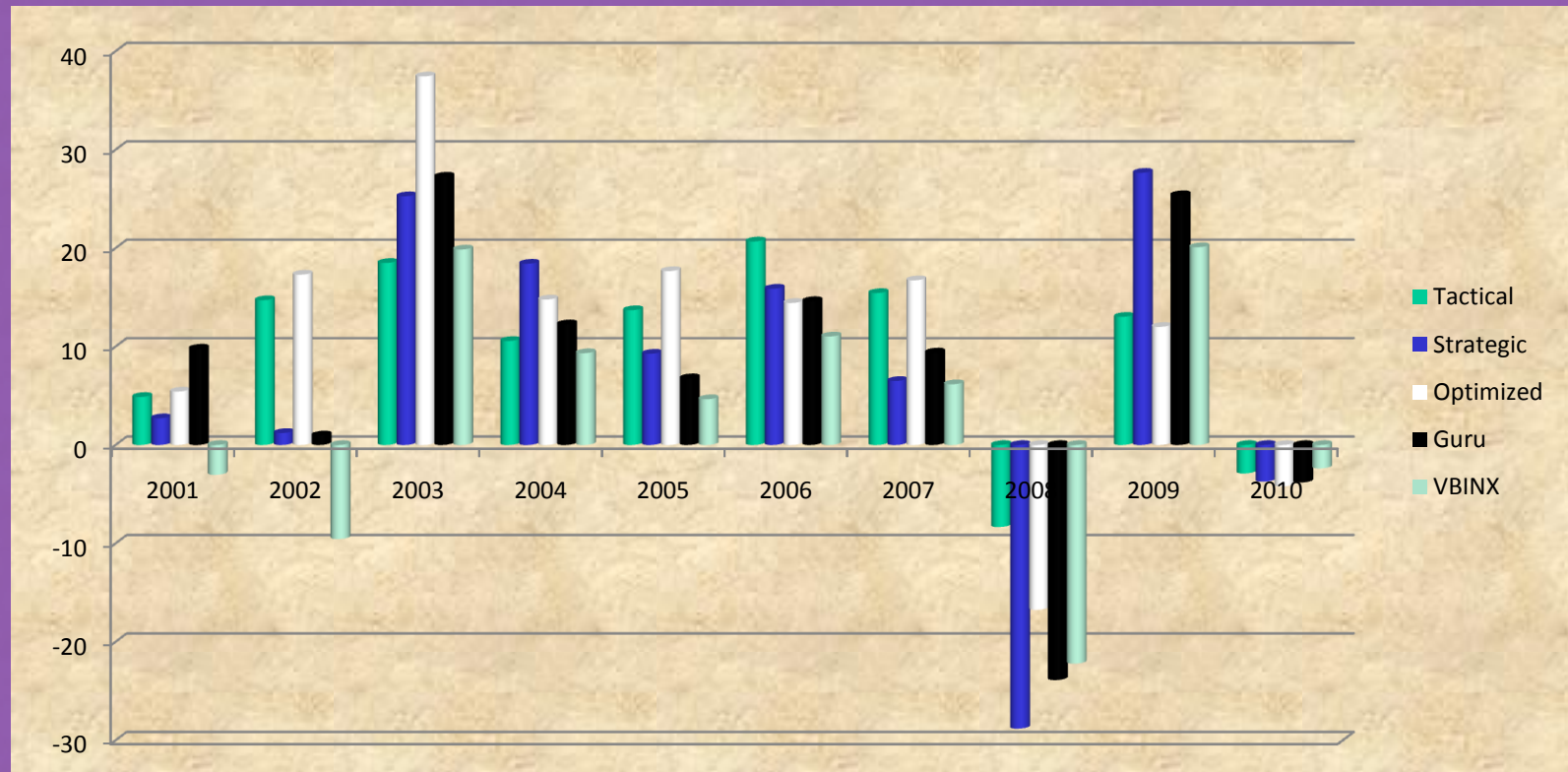
- Asset Allocation: decides 92% of a portfolio's return
- Diversification: invest in various assets stocks, bonds, real estate (REITs)
- Strategic and Tactical
 - Strategic: Modern Portfolio Theory
 - Tactical: Major asset momentum, follow smart manager, optimized
- Fund Selection: risk adjusted returns, fees

Easy to Follow

- Total customization
 - Plan Specific: available funds and redemption limits
 - Personalized: model portfolios based on your risk profile
- Manage your personal accounts
 - Precise rebalance instructions
 - 30 minutes a month or a quarter to rebalance

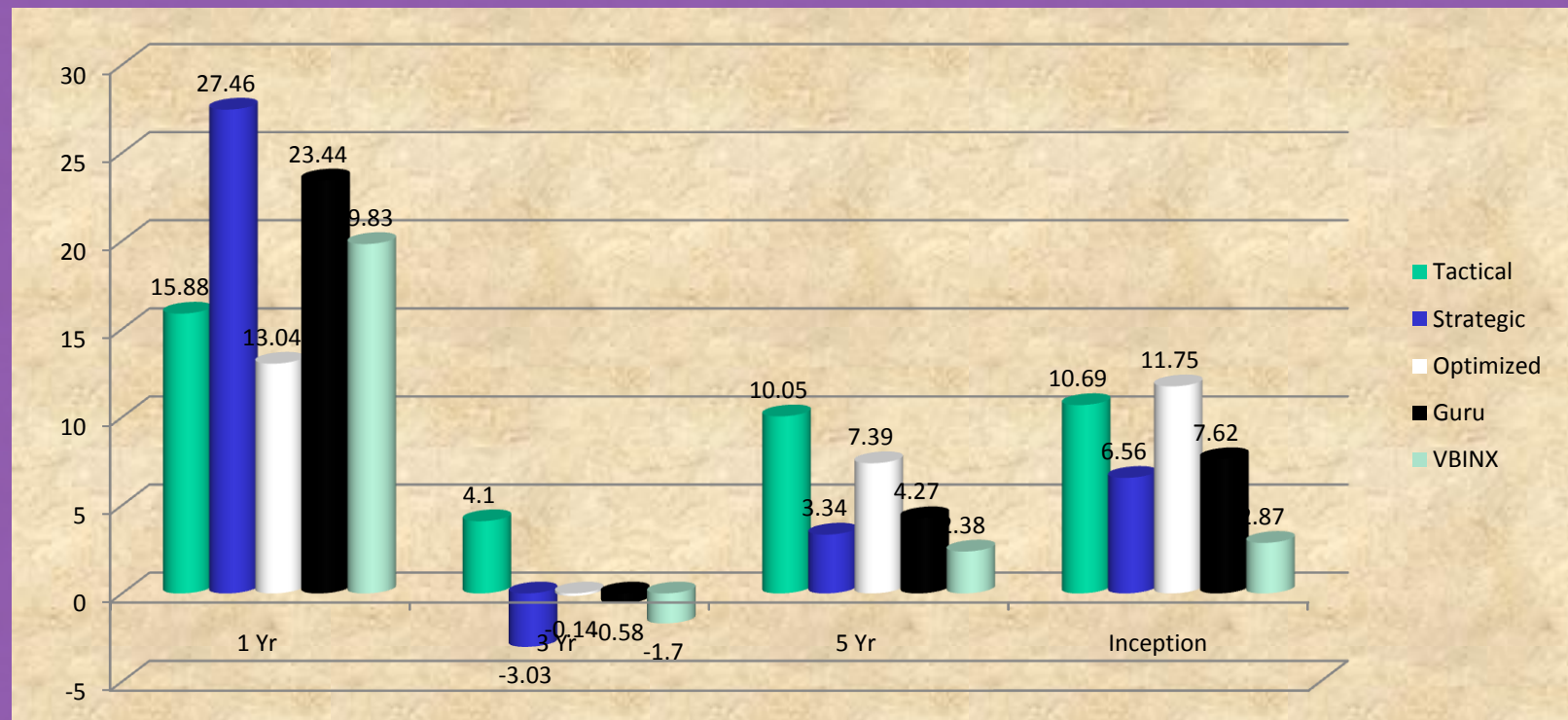
But my *401K* has become *201K*!?

- Moderate Model Portfolios of Evergreen Plans Four Strategies vs. Vanguard Balance Fund Index VBINX (Intel 401K Plans from 12/31/2000 to 2/8/2010)



Strategy Performance

- Moderate Model Portfolios of Evergreen Plans Four Strategies vs. Vanguard Balance Fund Index VBINX (Intel 401K Plans from 12/31/2000 to 2/8/2010)



Why Should I Trust Your Strategies?

- Well researched results
 - Modern Portfolio Theory: Diversification
 - Tactical Asset Allocation: Momentum, Smart Managers
- Well practiced wealth investment strategies
- Rigorous risk control by
 - Diversification
 - Active managing/rebalancing
- What if so many people follow the same strategies
 - Major assets like diversified mutual funds, total US stock and debt markets