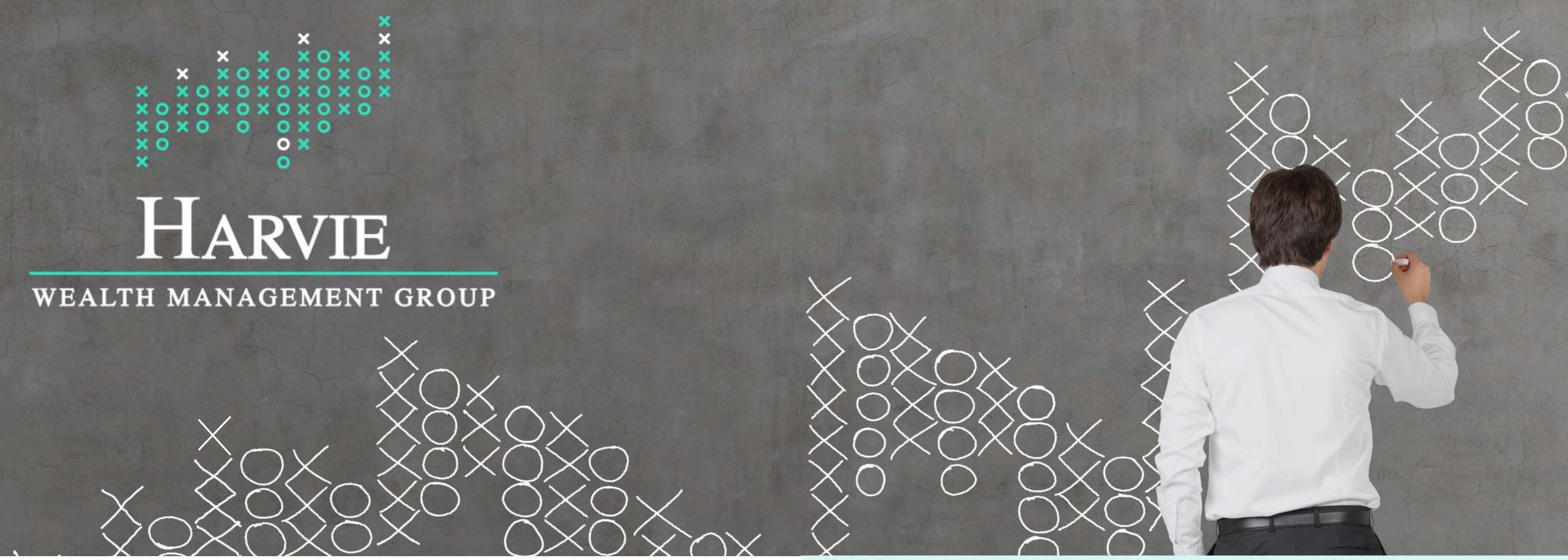

Our Story

We offer a multi-generational advisor and support team with both retail and institutional experience. With clients in 28 states we specialize in proprietary, in-house managed investment portfolios through a data-driven approach.

A key strategic element in football is a proprietary playbook that plots x's and o's representing offensive and defensive players in game-day situations. Strong players stay in the game, while weaker players are sidelined.

Similarly, we employ Point & Figure Charting, which, like a playbook, uses x's and o's to represent supply and demand of asset classes.

- Seeks to determine relative strength, a measure of price trends that indicates how an investment is performing relative to other investments.
- These rankings determine which investments earn their way into the portfolio and which are left on the sidelines.
- When rankings shift, we substitute outperforming for underperforming investments. In short, we strive to buy winners, sell losers, and repeat.

When paired with meticulous, individualized planning, we believe this methodical approach offers clients the opportunity to win.

What We Offer

- Come under our brand (Harvie) or identify as a sub-brand
- Office space as desired with potential to work from home
- Staff and backup support: we will accommodate your existing support
- Negotiable compensation plan: scalable payout
- Income received through 1099, which may allow you to take advantage of IRS tax structures (*Wells Fargo Advisors Financial Network is not a legal or tax advisor.)*
- Locally eligible for participation and best practice awards as added incentives
- Choose what your responsibilities are and how you spend your time
- Work to maximize efficiency through our streamlined processes and scale your business
- Full technology, marketing, telecom, and help-desk support
- Initiate buy/sell agreements: ideal for advisors looking to exit or scale back
- Ideal for mid-career advisors looking to enhance their businesses
- In-house, proprietary FA-directed models at no additional cost and no requirement that you implement them

Our Approach

Get to know you and your business objectives

1

DISCOVER & DETERMINE FIT

Learn your pain points, options, and opportunities

2

ANALYZE BUSINESS MIX & GENERATE PROFORMA

Value your business and understand key drivers

3

COLLABORATE STRATEGY & CHOOSE YOUR FUTURE

Create a plan that works for you

4

ONBOARDING & ONGOING SUPPORT

Experience your new normal

5

FINISH WELL ON YOUR TERMS

Celebrate your achievements

HARVIE

WEALTH MANAGEMENT GROUP

Wells Fargo Advisors Financial Network is currently offering competitive transition packages for qualified advisors. Our turnkey practice generally reduces your typical out-of-pocket expense and helps you manage your time.

Our Spectrum of Services:

- Operations
- Branch Management Duties
- Office Space
- Bookkeeping
- Compliance Support
- Human Resources
- Staff Benefits, 401k + Match, Payroll
- Entity Setup for Advisors (if desired)
- SEP IRA Potential for Advisors
- Day-to-Day Management
- Investment Management (if desired)
- Marketing/Communications
- Technology and Telecom
- Continuity and Succession Planning
- 3rd Party Book Valuations

Visualize Growth Production Level Payout

- Less than $500k = Negotiable
- $500k to $1MM = Minimum 55%
- $1MM to $1.5MM = Minimum 60%
- $1.5MM -$2MM = Minimum 65%
- $2MM -$3MM = Minimum 70%
- Over $3MM = Negotiable

Payout and rate or other information is strictly hypothetical and is provided by Harvie Wealth Management Group for illustrative purposes only and are not indicative of actual or guaranteed earnings. Actual compensation structures vary and are subject to separate agreement between financial advisor and Harvie Wealth Management Group.

Financial advisors who associate with Wells Fargo Advisors Financial Network, LLC (“WFAFN”) do so as independent contractors and, not employees, of WFAFN or any of its affiliates. Nothing in this document states or implies an employer/employee relationship with WFAFN or any of its affiliates. Any agreements entered into by a financial advisor with Harvie Wealth Management Group are separate, distinct, and independent from any agreements and/or arrangements with WFAFN or any of its affiliates. WFAFN or any of its affiliates are not responsible for any compensation information set forth in this document and nothing herein should be construed as an offer of affiliation with WFAFN, a contractual obligation, or an expectation of future economic benefit.

Investment products and services are offered through Wells Fargo Advisors Financial Network, LLC (WFAFN), Member SIPC. Harvie Wealth Management Group is a separate entity from WFAFN. PM-09042025-6451089.1.1

Get In Touch To Learn About Your Opportunity

J. Chris Harvie, CFP®
Managing Partner

HARVIE
WEALTH MANAGEMENT GROUP

3460 W Clay Street | Richmond, VA 23230 | 804-362-6803 | chris@harviewmg.com | www.harviewmg.com