Envision Wealth Planning Website Disclosures

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These Terms were last updated on September 22, 2016.

Risk Disclosure

Different types of investments involve varying degrees of risk. Therefore, it should not be assumed that future performance of any specific investment or investment strategy will be profitable.

Asset Allocation may be used in an effort to manage risk and enhance returns. It does not, however, guarantee a profit or protect against loss. Performance of the asset allocation strategies depends on the underlying investments.

This web site is intended to provide general information about Envision Wealth Planning and its services. It is not intended to offer or deliver investment advice in any way. Information regarding investment services are provided solely to gain an understanding of our investment philosophy, our strategies and to be able to contact us for further information.

Market data, articles and other content on this web site are based on generally-available information and are believed to be reliable. Envision does not guarantee the accuracy of the information contained in this web site. The information is of a general nature and should not be construed as investment advice.

Please remember that it remains your responsibility to advise Envision, in writing, if there are any changes in your personal/financial situation or investment objectives for the purpose of reviewing/evaluating/revising our previous recommendations and/or services, if you would like to impose, add, or to modify any reasonable restrictions to our investment advisory services.

Envision will provide all prospective clients with a copy of our current Form ADV, Part 2A ("Disclosure Brochure") and the Brochure Supplement for each advisory person supporting a particular client. You may obtain a copy of these disclosures on the SEC website at http://adviserinfo.sec.gov or you may Contact Us to request a free copy via .pdf or hardcopy.

Email Disclosures

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Please note: Envision does not accept trading or money movement instructions via email.

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If you have received an email from Envision in error, we ask that you contact the sender and destroy the email and its contents.

If you have any questions regarding our email policies, please Contact Us.

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If you have any questions regarding our policies, please Contact Us.