Merrill Lynch

The Heilbronn Group

TOTAL MERRILL®

The Heilbronn Group

The Heilbronn Group provides customized wealth management services to families and affluent individuals, including corporate executives—from media, entertainment and financial services industries—and private business owners.

We are a family team of Financial Advisors within Merrill Lynch, a firm with unsurpassed resources in wealth management, global markets and research. Every day we leverage these resources on behalf of clients to help them develop strategies designed to achieve their life and financial goals. With client accounts valued at $1.5 billion, we are proud to be one of Merrill Lynch's leading advisory groups.

Our advice is based on our relationship with you

Advising people about their finances is our core business and, to do this well, we focus our attention and effort on establishing a deep and valued relationship with each client.

We listen:

learning your needs, aspirations, and challenges.

We understand:

helping you set financial and lifestyle objectives within the framework of your longer term goals.

We respond:

assisting you to develop strategies, finding solutions and uncovering opportunities that may affect your financial future.

Stanley Heilbronn, Senior Vice President–Investments and Wealth Management Advisor, is the founding member of The Heilbronn Group and also directs our team's investment strategy. *Gregory Heilbronn,* Vice President and Financial Advisor, is responsible for our equity trading activities. *Andrew Heilbronn,* Vice President and Financial Advisor, specializes in wealth strategies, helping clients focus on retirement and estate planning issues, and helps identify asset managers and mutual funds for clients. Each is involved with personal client relationships.

Three experienced Client Associates provide valuable professional support, taking responsibility for all administrative functions, such as gathering and maintaining financial information for client reviews.

We draw on the extensive experience of all team members to provide perspective and help clients navigate the turbulence of the markets through entire business cycles.

A family team – a cohesive group

We offer expansive capabilities

Over the years, we've expanded the scope of our wealth management services to meet your increasingly complex needs. We are committed to helping you achieve your financial goals and objectives by offering a wide range of diversified strategies through the Total Merrill℠ platform of financial products and services, one of the broadest and most open platforms in the industry.

Investments

- Equities, including ETFs
- Wealth management strategies, including asset allocation
- Fixed income
- Concentrated stock services, including "collars" and Rule 144/145 sales and lending
- Alternative investments
- Managed accounts

Estate Planning Services

- Estate planning and trust services
- Philanthropic and gifting strategies

Retirement

- Retirement Income
- Beneficiary designation strategies

Credit and Lending

- Home financing
- Personal credit

Our attention to detail delivers solutions for you

Our first priority is you. We've built our business on the level of personalized attention we focus on each client. And because we are a small, cohesive group, each member of The Heilbronn Group gets to know you and your unique financial needs.

We use Merrill Lynch's impressive tools and technology to help make your life easier and your financial assets more productive. We can access transaction records and balance information in real time and can generate an array of informational and analytical reports that allow us to advise you in a timely manner.

We will meet with or communicate with you as often as necessary. Some clients prefer monthly or quarterly reviews, others weekly or daily. It is gratifying to us that many clients view The Heilbronn Group as being a key resource in their complex financial lives.

Our reputation and our commitment to you

Our success is a function of the success and satisfaction of our clients, and that's why trust, reliability and availability are woven into the fabric of every client relationship.

Clients look to the Financial Advisors of The Heilbronn Group to provide customized advice, express balanced opinions and be sounding boards for their ideas. They trust us to be impartial, objective, and to always focus on their best interests. They rely on us to develop strategies and accurately monitor their financial lives. To support this trust, we make every effort to be available to clients whenever we're needed.

Our reputation for providing access to ideas and solid advice has spread throughout the media, entertainment and financial services industries, attracting a wide range of affluent families and individuals. Most rewarding to us is that an extraordinary percentage of our clients are referrals from other clients—a positive indicator that our approach and skills are satisfying their needs.

What life do you envision?

For more information, contact Stanley, Gregory or Andrew Heilbronn of The Heilbronn Group.

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Neither Merrill Lynch nor its Financial Advisors provide tax, accounting or legal advice. Clients should review any planned financial transactions or arrangements that may have tax, accounting or legal implications with their personal professional advisors.

The Total Merrill brand is used to refer to the broad range of brokerage, investment advisory (including financial planning), banking, trust, mortgage and other financial services and products offered by Merrill Lynch. The nature and degree of advice and assistance provided, the fees charged, and client rights and Merrill Lynch's obligations will differ among these services.