



Plan. Protect. Prosper.

We wanted to take the opportunity to introduce you to our firm as well as Northwestern Mutual. We also wanted to give you an insight into what we do as a wealth management practice. Attached you will find information about our team, our mission and values, and an indepth look at our financial process.

We look forward to beginning to help you along this financial planning journey!

Sincerely,

Thomas Farmer CFP®, MBA. CLU®, ChFC® Wealth Management Advisor

Edward Pride

Financial Advisor

& The Grindstone Wealth Management Team

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The Team.



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About Tom Representing Northwestern Mutual since 2009

I have been married to my wife Liz since 2011, and we currently live in Plymouth, MA with our four children: Abby, Thomas, Claire, and Teddy.



Representing Northwestern Mutual since 1990

My wife, Anne, and I live in Falmouth. We have two grown children who live in San Francisco and New York City.



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Value Proposition.

How We Add Value

The value we deliver to our clients is driven by 5 core tenets.

1. Integrated Planning

- We save clients time by putting all major planning elements under one roof.
- · We use a coordinated approach to ensure that together, planning elements are aligned and synergistic.
- · We don't just create a plan that sits on a shelf, we guide clients through implementation as well.

GWM Value

2. World Class Strategies

- · We have access to industry leading products and tax-efficient savings strategies*.
- Our award winning team is capable of tailoring plans for the most complex financial situations.

3. Platinum Level Service

- Highly responsive.
- Accurate and thorough.
- Strong team oriented to exceeding expectations.

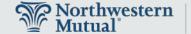
4. Goal Focused Processes

- We develop a keen, personal understanding of each client's financial goals.
- We tailor each plan for each client as life changes course.
- Regular reviews hold us accountable for achieving success as a team (Advisor & Client).

5. Relationship Focused Approach

- We view true understanding of our clients' values, motivation, and sensitivities as critical to the planning process.
- We are committed to earning our clients' trust and confidence.
- We are deeply motivated to help our clients' live lives free of financial stress and to achieve their financial goals.
- Achieving the highest level of client satisfaction is the only way we have grown.

Financial Representatives do not render tax advice. Consult with a tax professional for tax advice that is specific to your situation.





Our Mission.

Our team is committed to providing you financial peace of mind with our comprehensive financial planning strategy. We will look not only at the accumulation of your wealth, but also at the protection of your wealth in order to create a personalized financial plan that brings you clarity and aligns your present situation with your future goals and plans.

Core Values

Relationships

Your financial plan shouldn't simply be a business transaction. We share with our clients, a strong commitment to family, and therefore we pride ourselves on cultivating relationships in order to best serve them.

Integrity

Integrity creates trust, and trust is vital to any relationship whether it be professional or personal. That is why we strive to foster an environment of honesty, fairness, and respect within our business.

Professionalism

We are personally committed to continuous improvements and professional growth, to be on the cutting edge of strategy, legislative changes, and ideas. Every member of our team is committed to continue our financial education in order to deliver the highest quality of work, and exceptional service.

Accountability

We take ownership in our words, and our actions. We hold ourselves accountable in order to make timely decisions, to communicate effectively and honestly, and to follow through on commitments.

