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 in-depth 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**

The Team.

Thomas Allan Farmer

CFP®, MBA, CLU®, ChFC®

Wealth Management Advisor

Phone: (781) 664-1206
Email: thomas.farmer@nm.com
Website: grindstonewealth.nm.com

45 Braintree Hill Park
Suite 204
Braintree, MA 02184

About Tom
Representing Northwestern Mutual since 2009

Family
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.

Ned Pride

Financial Advisor

Phone: (781) 664-1234
Email: ned.pride@nm.com Website: grindstonewealth.nm.com

45 Braintree Hill Park
Suite 204
Braintree, MA 02184

About Ned
Representing Northwestern Mutual since 1990

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

Katie Regan

Director of Client Relations

(781) 664-1215
katie.regan@nm.com
Current licenses: FINRA Series 6, 63 & 7, MA Life and MA Health

Representing Northwestern Mutual since 2015

Amy Cannon

Marketing & Client Relationship Manager

(781) 664-1200
amy.cannon@nm.com

Representing Northwestern Mutual since 2020

Jordan Hirsch, MBA

Director of Investments

(781) 664-1246
jordan.hirsch@nm.com

Representing Northwestern Mutual since 2016

William Haggard

Investment Analyst

(781) 237-7070
william.haggard@grindstonewealth.nm.com

Representing Northwestern Mutual since 2021

Connor Downs

Associate Financial Representative

(781) 701-3445
connor.c.downs@nm.com

Representing Northwestern Mutual since 2022

Northwestern Mutual | GRINDSTONE WEALTH MANAGEMENT

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.

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.*

Northwestern Mutual | GRINDSTONE WEALTH MANAGEMENT

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.