# M&C Complete

Let's get there. Together.

Moors & Cabot Investments
EST. 1890

*"...dedicated and committed to helping people achieve their financial goals."*

Moors & Cabot's vision. While it may be a simple statement, it's far from a simple undertaking...

M&C Complete is a different relationship with your financial professional.
One centered on goals... **yours**.

## Core Activities + Exclusive Capabilities = Success

M&C Complete is a comprehensive approach, defining core activities that set a foundation upon which a holistic advisor-client relationships are built. This foundation of core activities are augmented by tools, services, and capabilities only available to M&C Complete clients.

In this way, a "Complete" system helps ensure all your specific financial goals, situations, and concerns are fully understood ... and explored.


## A Team of Experts ... At Your Service

Your M&C Complete Financial Professional has access to teams of deeply qualified experts in many areas of financial wellness.

Our Comprehensive Planning profile process will help us uncover any situations where they can call upon this team to lend their expertise.

## What Does “Complete” Look Like?

Across the four pillars, M&C Complete defines core activities. Additional activities and services are available, provided if they match your unique needs.

There are also M&C Complete “exclusives” in support of each pillar. These are technology tools, services, experts and events only available to M&C Complete clients.

### Planning

✓ **MoneyGuide** Goals Based Financial Planning

• **Strategic Income Planning**

• **RightCapital** Planning with Dollar Impact

• **Snug** Trust & Estate Plans Made Easy

### Investments

✓ **CircleBlack** Allocation & Exposure

✓ **Nitrogen** Investment Risk Scoring

• **Portfolio Management Programs**

• **Models-Based Investing**

### Communication

✓ **WealthBox** Premium Relationship Management Tools

✓ **Defined Touchpoints**

• **Webinars & Events**

• **M&C Complete App**

• **The Complete Newsletter** News, Updates & Innovations

### Advice

✓ **Comprehensive Planning Profile**

• **Wealth Strategist Team**

• **Insurance Review & Analysis**

• **Trust Review Services**

• **Medicare Consult Services**

• **Charitable Giving Strategies**

| ✓ Core | • Available | M&C Complete Exclusive |
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## Ready to Get Started?

Contact your Moors & Cabot Financial Professional to get started with M&C Complete

The M&C Portfolio Management Program (PMP) is a service where your Financial Advisor is the portfolio manager. PMP can be either be managed on a discretionary or non-discretionary basis. Brokerage services are provided by Moors & Cabot, Inc. and custodial and related services provided by RBC Capital Markets, each a member NYSE and SIPC. Moors & Cabot charges percentage of assets that may be negotiable when entering into the agreement. You can find the Form CRS and ADV Brochure and other relevant disclosures on our website at www.moorscabot.com.