

Dynamic Wealth Optimization™

Enhancing, Protecting & Sustaining
Generational Wealth



**DREAM
CATCHER**

WEALTH MANAGEMENT

Financial Solutions and Independent Advice



How do you define
WEALTH?



Discover the DreamCatcher Difference!

Enhancing, Protecting & Sustaining GENERATIONAL WEALTH



Many of our clients have accumulated their wealth over time; in some cases, over multiple generations. Others have come into their wealth more recently through an inheritance or a liquidity event such as the sale of a business. When it comes to serving our clients, we have a three-fold mission, which is to help our clients enhance, protect and sustain their wealth. We call this Wealth Optimization.

ENHANCING wealth is about capitalizing on opportunities...

It means making smart decisions about where and how to deploy a family's assets. Some of the best opportunities are not always apparent to the untrained eye. To enhance wealth one must know what to look for and where to look for it.

PROTECTING wealth is about minimizing threats...

It is about managing risk in a prudent and cost effective way. Undue risk comes in many forms. It can easily be overlooked until it is too late to avoid. Protecting wealth requires insight and foresight. It demands that we remain diligent and proactive at all times.

SUSTAINING wealth is about stewardship...

It is about managing one's resources with an eye toward the future. When it comes to inter-generational wealth, sustainability depends on the extent to which a family's values are passed on from one generation to another. Stewardship calls for a strong sense of purpose. It requires us to have a clear and meaningful vision; one that is embraced by those who will carry our torch in the future.

Why Wealth Optimization?

The internal and external forces that affect a family's wealth...

both positively and negatively – are constantly changing. Opportunities to enhance wealth can present themselves at any time. The same is true of risks and other threats that can adversely affect a family's wealth. Our attitudes about wealth evolve over time. Our goals and objectives also change, as do the time frames within which we can achieve them. Dynamic Wealth Management™ allows us to adapt and respond to all of these variables.

The concept of “wealth” tends to very subjective and highly personal...

Perceptions about what it means to be “wealthy” vary greatly. For this reason, we begin every client relationship by establishing a mutual understanding. First, we seek to understand how our clients perceive their wealth. Then, we share our perspective, which is defined by the Eight Dimensions of Wealth™. This unique map allows us to explore eight separate areas (dimensions) that can affect a family's wealth in a positive or negative way.

The term “wealth management” is used by most financial advisors today...

If you ask other financial advisors what the term means (or what they actually do for their clients) you will likely get a wide range of answers. To avoid confusion we use the term wealth optimization to describe what we do for our clients. Wealth optimization is an ongoing process that seeks to achieve three specific objectives for our clients – to ENHANCE, PROTECT and SUSTAIN their wealth. We accomplish this by leading our clients on a collaborative journey, which we call our Wealth Optimization Process™.

What do you want your WEALTH to do
for you and your family?

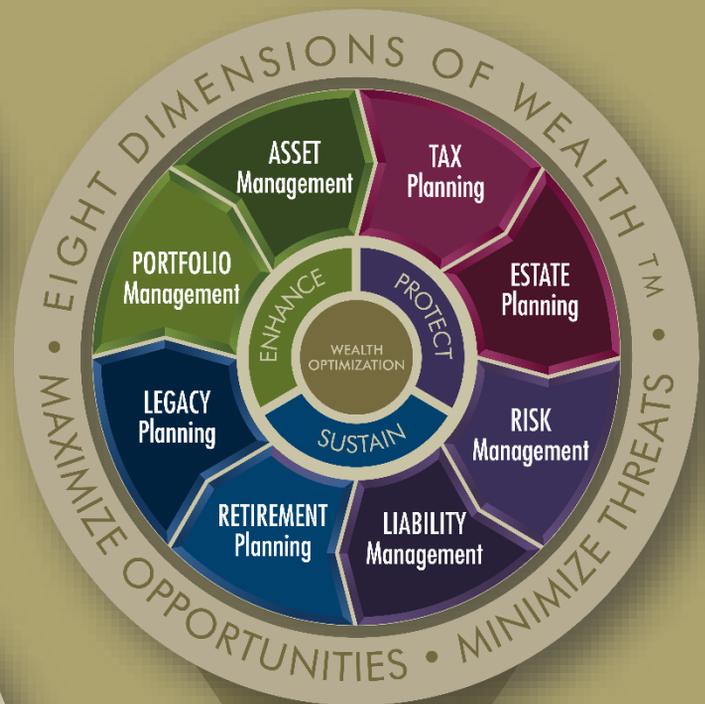
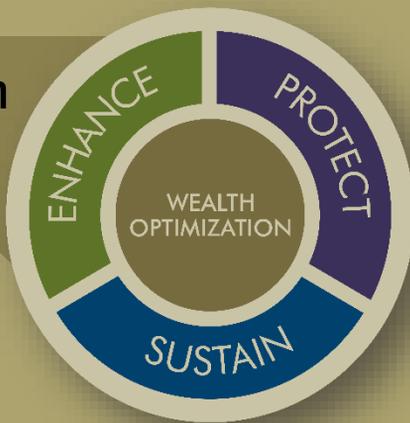


Dynamic Wealth Optimization™

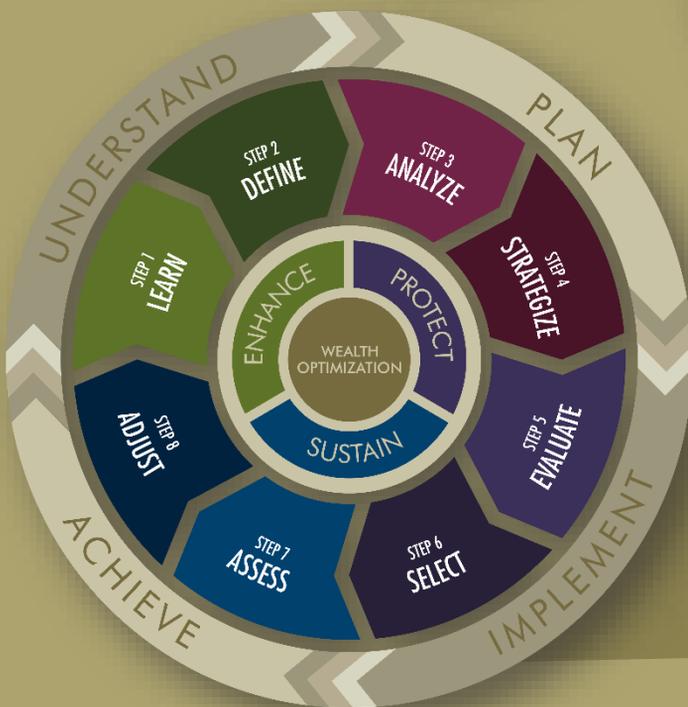
One of the things that distinguishes DreamCatcher Wealth Management is our unique approach to working with clients. We call it Dynamic Wealth Optimization™ and it consists of three main elements...

- Our MISSION which is to help our clients enhance, protect and sustain their wealth;
- Our Wealth Optimization MAP which allows us to uncover opportunities to enhance our clients' wealth as well as threats that can adversely affect generational wealth;
- Our METHODOLOGY which is a collaborative process that enables us (and our clients) to make prudent decisions and achieve our goals.

Our Mission



Our Map



Our Methodology

Our Wealth Optimization Map

Our Wealth Optimization Map contains eight areas of exploration. We call these the Eight Dimensions of Wealth™. Our map is like an eight-dimensional lens that allows us to see hidden opportunities and undetected threats. It also provides our clients and their families with a logical framework for making smart and thoughtful decisions about their wealth.

The most important thing to note about this map is that a family's wealth can be significantly impacted (positively or negatively) in ALL eight areas. There are many opportunities to enhance a family's wealth. Likewise, there are any number of risks and other threats that can adversely affect a family's wealth. Many people fail to optimize their wealth because the best opportunities are not always apparent to the untrained eye. The same is true for some of the most serious threats. Opportunities and threats can arise from normal life transitions, most of which are predictable. But, they can also present themselves when unexpected events occur, such as personal health issues and unusual economic developments.

Eight Dimensions of Wealth™

1. Portfolio Management
2. Asset Management
3. Tax Planning
4. Estate Planning
5. Risk Management
6. Liability Management
7. Retirement Planning
8. Legacy Planning



Our Methodology

Our methodology is defined by a disciplined yet flexible process that allows us to accomplish our mission of helping our clients enhance, protect and sustain their wealth. Our Wealth Optimization Process™ is a collaborative journey that has four distinct phases – UNDERSTAND + PLAN + IMPLEMENT + ACHIEVE.

The initial “voyage” can take weeks or even months to complete. Please note that the eighth step leads back into the first one, making this a continuous effort. In an ever-changing world, there are always new opportunities to discover. Similarly, new risks or threats can present themselves at any time. Our job is to stay at the helm and remain vigilant at all times.

DreamCatcher Wealth Optimization Process™

Step 1: Learn

Step 2: Define

Step 3: Analyze

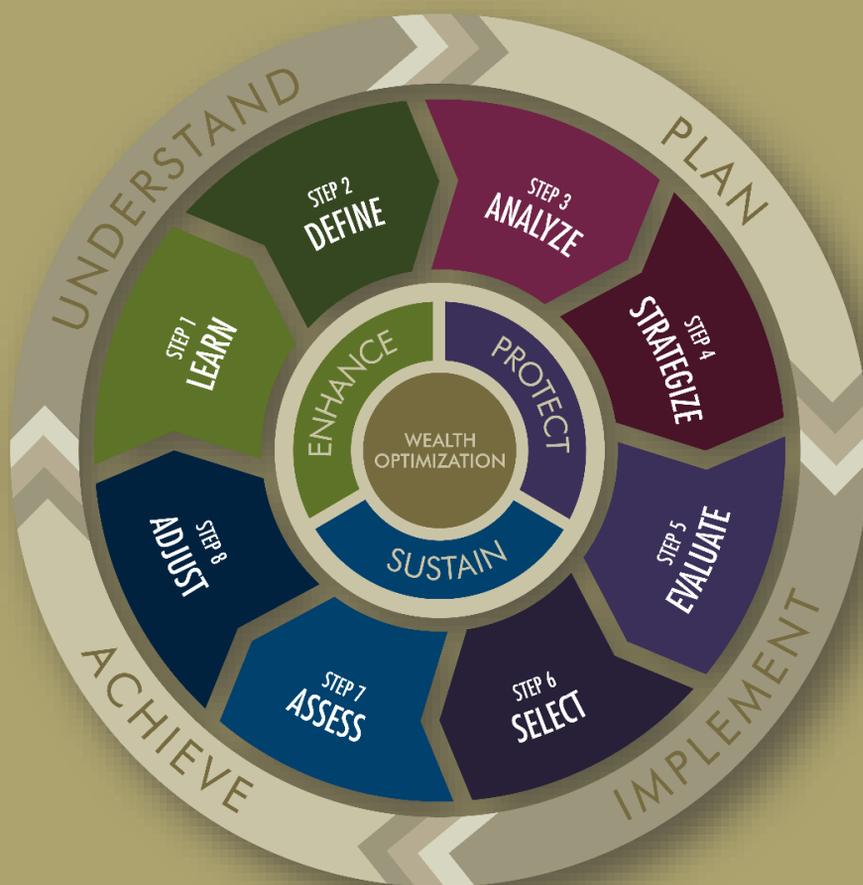
Step 4: Strategize

Step 5: Evaluate

Step 6: Select

Step 7: Assess

Step 8: Adjust



The DreamCatcher Difference

DreamCatcher Wealth Management

is a private wealth management consultancy based in Wichita, KS. We offer personalized services to individuals and families. Our clients include athletes, business owners, corporate executives, educators, medical professionals and retirees. Our firm was founded in 1986 by Stan T. Webb. Stan is a Certified Fund Specialist and a Certified Senior Advisor. It is his passion for helping people that sets him apart from other financial professionals.



Financial Literacy Advocate

Over the years, Stan has become a strong advocate for financial literacy. He learned early on that the key to achieving long-term financial success is the ability to make informed and unemotional decisions based on unbiased advice. This is why he makes time to educate his clients as well as their key family members.

Stan is the co-founder of the Minerva Foundation for Financial Literacy. He has hosted financial literacy town hall events throughout Kansas and received city and state proclamations for his work. Stan's passion for financial literacy was recently recognized by The National Financial Educators Council (NFEC), which named him as an initial board member to guide the development of their youth financial literacy curriculum.

Eldercare Champion

In addition to his work in the area of financial literacy, Stan has a strong focus in the area of eldercare. He is deeply committed to helping families deal with the financial and emotional challenges that often confront them when caring for their elders. Toward that end, Stan recently established the Eldercare Channel of Wichita, a comprehensive network of professionals who provide a myriad of eldercare-related services.

**For a confidential consultation, please call /visit us at
316-265-5151 or DreamCatcherWealthManagement.com**