



Margaret Dechant

6 Meridian, CEO

6 MERIDIAN

Welcome



The Vision for 6 Meridian

- To **grow** and **expand** our business by focusing resources on the specific needs of our clients and their families
- Bring **innovative** solutions to our clients beyond what was available in the wire house environment
- Continue to add **capability** and **expertise** in line with our clients needs
- Invest in our own business and in our **community**



6 MERIDIAN

6 Meridian Team



Expanding our capabilities- Expertise

September 9, 2016

13 team members

September 9, 2019

20 team members

Investment management team – 3 new positions

Analyst

Portfolio Manager

Associate

Wealth Advisory – 4 new positions

2 Wealth Advisory Associates

2 Wealth Advisors



Expanding our capabilities- Solutions

Innovative investment solutions

- 2018 Global Private Credit
- 2019 Real Estate Income Fund

Introduction of sophisticated and customizable wealth planning tools with broad capabilities. *Launch 2020*

- Cash flow projections
- Budgets
- Estate planning modeling
- Philanthropic goal planning
- Mobile app
- Digital 'vault' for documents/statements



Expanding our capabilities- Solutions

Education and resources for the entire household of clients

- Information for investors
 - (monthly viewpoint and topical posts on market and economy)
- Expanded resource library at 6meridian.com
- Financial education for women
- Life stage financial planning for the next generations

New office space for our expanding team

- Technology to enhance client experience
- Facility to accommodate client events and education



6 Meridian on a National Scale

28,000 RIAs in the US, only 600 manage over \$1B in assets

In 2018 recognized as the 217th largest RIA in the U.S.

The 6 Meridian 'breakaway' story was featured in an industry podcast as a resource for other advisors considering launching a firm.

Center for Financial Planning 2018 study highlighted our commitment to providing career paths for the next generation of wealth management talent and the development of our advisor training program.

Citywire "Future 50 RIA" in recognition of our efforts to build an enduring advisory firm to service generations of clients with generations of resources.



6 MERIDIAN



Local News

Recognized locally for our ability to attract young professionals to the city of Wichita

Named “The Best Place to Work” (small business category) by the Wichita Business Journal

Resource for a number of local media for information regarding the market, economy, and financial trends.

A historical map of the 6th Meridian area in Kansas, showing various landmarks and geographical features. The map is partially obscured by a dark diagonal band.

6 MERIDIAN

Our Community



6 MERIDIAN