At Global Wealth Strategies & Associates,

our mission is to educate and inspire clients where a predictable lifetime of financial security is possible. We take tremendous pride in our independent and unbiased advisement, backed by world-class people and resources.

Our skilled advisors are highly educated with many years of experience, and have earned industry designations including:

- CERTIFIED FINANCIAL PLANNER™, CFP®
- Accredited Investment Fiduciary, AIF®
- Accredited Portfolio Management Advisor, APMA®
- Certified Public Accountant, CPA
- Accredited Estate Planner, AEP®
- Chartered Financial Consultant, ChFC®
- Certified Retirement Counselor, CRC®
- Financial Paraplanner Qualified Professional, FPQP™
- Registered Paraplanner, RP®
- Chartered Life Underwriter, CLU®
- Certified in Long-Term Care, CLTC
- Master of Business Administration, MBA

We pride ourselves in working cohesively with our clients’accountants, tax attorneys, estate planners, business planners, general counsel and other trusted advisors who support our clientele.

Comprehensive Financial & Estate Planning

To Fit Your Complex Financial Life

GWS&A | Global Wealth Strategies & Associates

www.gwsa.us

3200 Cherry Creek Drive South, Suite 280, Denver, CO 80209

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At **Global Wealth Strategies & Associates,** we help high-net-worth individuals and business owners like you prepare for a secure financial future. We represent you and/or your business, and we always remember whose money – and whose future – is at stake.

Individual/Family Planning

Protection Planning
- Financial needs assessment
- Life insurance needs analysis
- Disability income protection
- Long term care insurance

Wealth Management
- Investment strategies
- College funding strategies
- Accumulation programs in preparation for retirement
- Income replacement in retirement
- Social security analysis

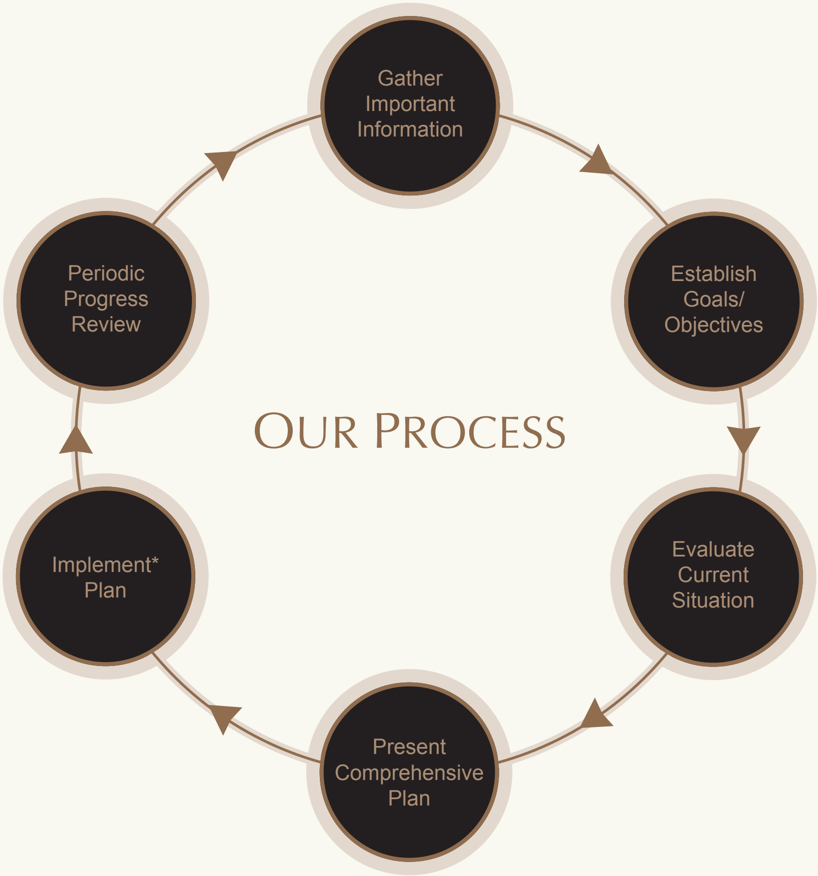
Estate Planning
- Estate tax minimization strategies
- Charitable giving techniques
- Wealth transfer strategies

Business Planning

Business Protection Planning
- Business evaluation
- Buy-sell strategies
- Buy-sell finding options
- Key employee insurance

Closely Held Family Business Planning
- Multi-generational dynamics
- Succession planning
- Estate equalization planning

Employee Benefits Planning
- Group insurances – life, disability income, LTC, medical
- Pension and profit sharing plans
- 401(k), Simple IRA, SEP IRA
- 403(b), TSA and custodial accounts
- Deferred compensation plans
- Executive bonus plans
- Split dollar arrangements



Our comprehensive process helps people identify their financial objectives, prioritize these objectives, and establish a systematic means to help ensure that they are achieved. We deliver a personalized plan that summarizes your financial goals and a series of recommendations that can help make your plan a reality.

Clients are free to implement* their plans with whomever they choose as an advisor; however most people choose us to help them turn their plans into reality.

Our comprehensive financial planning model strives to make sure we strike the right allocation of assets to help mitigate risk, maximize tax efficiency and optimize investment returns.

Our clients get exclusive and proprietary access to a personalized online wealth management service that we provide, offering them a secure, accurate view of their entire financial world.

Our clients greatly enjoy the benefits of using state-of-the-art technology and having a team of trusted advisors who work together to monitor and maintain their plan year-round.

The work we do with our clients empowers them to focus on career and family – what's most important to them – and enjoy the security of having a plan to help them manage their wealth effectively.