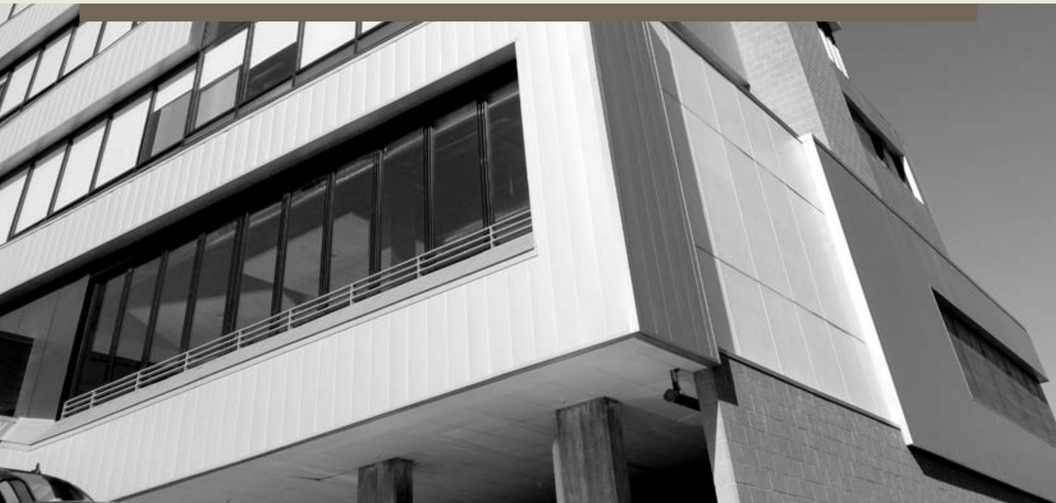
Colorado Wealth Group

COMPREHENSIVE FINANCIAL PLANNING



At **Colorado Wealth Group**, we help **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

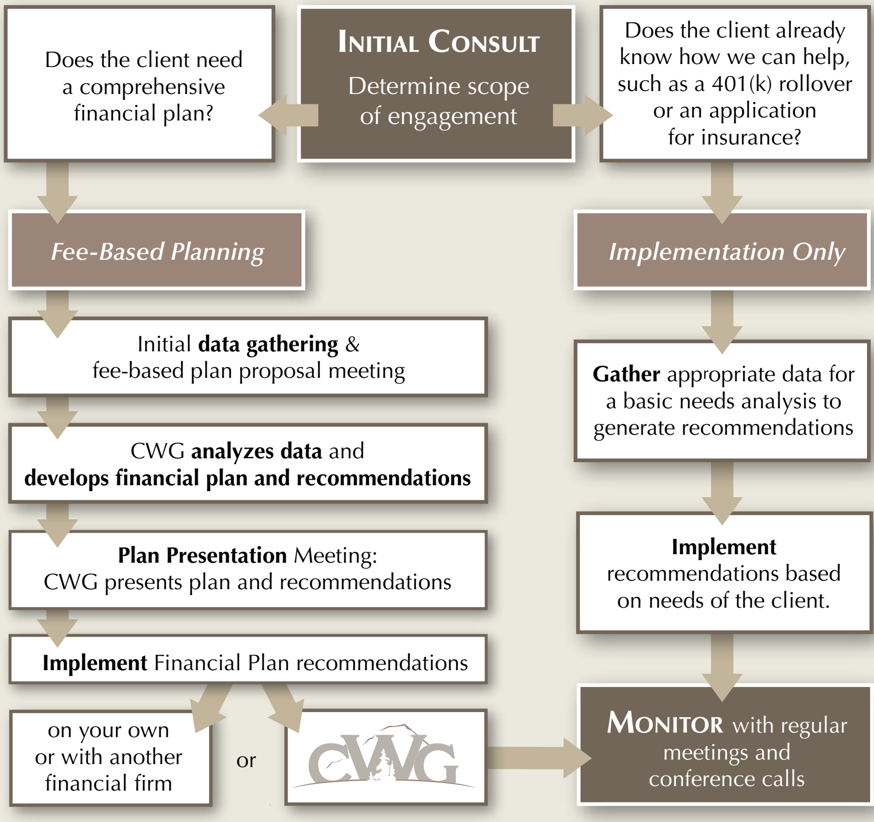
Closely Held Family Business Planning

- 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 Process



Prospective clients of Colorado Wealth Group have a choice. Although most can benefit from a comprehensive financial plan, not everyone needs this in the beginning. Many come to us with certain goals in mind and we can assist in the administration of those specific priorities. In these scenarios, our compensation comes from the implementation of such products or managed investment accounts.

Most clients opt to take a deeper dive into building their financial plan to discover where they truly are and where they need to be, and therefore choose to pay a fee up front for our services. Upon execution of a customized financial plan, clients have a choice where to implement our recommendations, however most elect to use Colorado Wealth Group. Regardless of the path of engagement, Colorado Wealth Group is here to ensure that your plan will be custom fit for your needs.

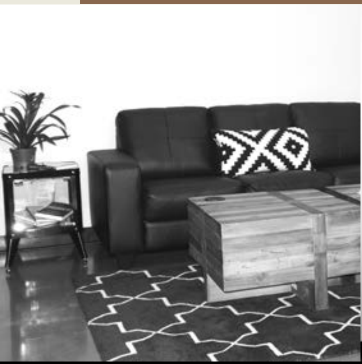
Colorado Wealth Group

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 invitation-only access to a **personalized online wealth management service** designed exclusively for them, 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.



At **Colorado Wealth Group**, 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 Wealth Management Advisor, AWMA®
- Chartered Financial Consultant, ChFC®
- Certified in Long-Term Care, CLTC
- Chartered Life Underwriter, CLU®
- FINRA Securities Licenses (Series 7, 6, 63, 65, 66)
- Life, Health, Disability & Long-term Care licensed
- Masters in 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.

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