GLENWOOD financial partners

3716 National Drive, Suite 114 | Raleigh, NC 27612 919.268.4100 www.glenwoodfinancialpartners.com

A **Better** Path to Your Goals

Glenwood Financial Partners is a wealth management firm that serves individuals, families, and business owners who seek a lifelong financial steward.

1 **The Challenge:** Life Goals Out of Sight

After inheriting substantial assets, a woman nearing retirement knew she needed to manage her finances with a more comprehensive focus. She'd been a working professional for decades, and the idea of investing was common throughout her adult life. Yet, she had only invested through her company's 401(k) plan and purchased random stocks via a stockbroker without any financial planning to guide her decisions.

Upon receiving her inheritance, her financial complexities grew when learning that some of the stocks she inherited were "overweight" without knowing how this factor affected her. Further, her future was unclear: Not only did she dream of building a new home, her upcoming retirement and pension distribution caused additional anxiety without a plan for coordinating all the pieces. So, rather than act, she kept her dreams on hold.

As a result, her financial life was in a dilemma teetering on the outcomes of disconnected decisions. Even though she had assets, she experienced difficulty in establishing a clear vision for her future.

2 **The Opportunity:** A Better Path to Her Goals

To help her best manage her inheritance, we identified her need for positive and proactive wealth management strategies.

We knew that she could do more with her assets in order to realize her goals. As her advocate, our priority was to provide the supportive, informed perspectives to help her live her best life.

So, we focused on:

COLLABORATE SUPPORT: Looking out for her best interest was our first priority. So, we focused on her unique goals and dreams by learning what she cared about. Our all-inclusive, transparent annual fee allowed her to avoid paying commissions and know that she had the support she needed at any point in our relationship.

EDUCATION: As stewards of her wealth, we helped her identify and understand available financial opportunities grounded in unbiased guidance and modern strategies. With clarity and empathy, we answered her questions and calmed her concerns.

GOALS-BASED PLANNING: We focused our recommendations around her lifetime goals, inheritance, employment income, and investment comfort. From there, we aligned her investments to her unique life, paying close attention to tax efficiency for setting her on the right path forward.

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Building the **Right** Relationships

Today and tomorrow, our goal is to help you live your best life.

3 **The Outcome:** Direction and Clarity for Her Future

Since working with Glenwood, our client has built the home of her dreams and more. She's created a financial foundation that allows her inheritance and assets to support her for the rest of her life. And for the first time, she sees a "reason for what she is doing" with her investments. By understanding the different investment strategies available to her, she was able to sell a major portion of her inherited stocks without regret in order to focus on tomorrow.

Today, our client no longer experiences anxiety around her financial decisions. With our ongoing support as advocates and confidants, she's moved from financial confusion to wealth management clarity and confidence.

4 Want a better path to your goals? **We're ready to help.**

Richard McElroy, III, AWMA®
Managing Partner
Financial Advisor

Michael Hakerem, CFA®
Managing Partner
Chief investment officer

We think you deserve true financial advocates who provide proactive, personalized support that helps you live your best life. So, we formed Glenwood to fill this industry gap and help each client preserve and grow their wealth with care – while gaining the clarity they need to know they're on the right financial path.

We're your full-service financial partner.

- Personalized Financial Plans
- Goals-Based Wealth Management
- Portfolio Management
- Consultative Guidance
- Proactive Support