GLENWOOD
financial partners
3717 National Drive, Suite 211 | 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: Noise Distracts Investors

Markets are dynamic and evolving – and a variety of life factors can affect performance. From geopolitical risks touted by politicians to media chatter sounding alarms, the noise can be loud and distracting.

When caught up in the sensation, investors can become irrationally exuberant or paralyzed by fear– and make short-sighted decisions.

Rather than look toward the long term, and embrace patience and humility, investors often panic when things feel tough and retreat into reactionary, ego-driven behavior.

Guided by heightened emotion over humble logic, these reactions can risk derailing their ability to achieve their goals.

2 The Opportunity: A Steady, Thoughtful Approach

As advisors, analysts, and strategists, we're no strangers to market volatility.

In fact, we've helped clients ride out difficult market environments and stay on track toward their goals for over 20 years.

Throughout our efforts, we've embraced the guiding principle and mantra: We cannot outguess the markets. We believe this realistic financial perspective helps us and our clients to remain humble and thoughtful – even when the noise remains loud.

As financial advocates, we recognize the ever-present upside reward and downside risks that the markets and securities present as a whole. To help investors stay focused toward their goals, we rely on four key components: 1) discipline, 2) process, 3) patience, and 4) customization.

By embracing these traits, our team and clients can minimize emotional reactions, ignore noise, and strategically act. We also believe that no person is an island. So, we collaborate with bright minds across securities analysis, investment- and risk management, strategic thinking, and financial planning.

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Building the **Right** Relationships

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

3 **The Outcome:** Collaborative, Personalized Relationships

As fiduciaries, our clients give us discretion to act on their behalf. And our goal is to help each client find their voice and elevate it above the noise surrounding them.

We believe this advisory relationship is possible only when you embrace humility. To do so, we leave ego aside and welcome collaborative discussions and personal relationships. No matter if clients prefer to delegate all financial responsibilities or remain involved, we work together in the ways that matter to them.

By listening to our clients, caring for their needs, and acting thoughtfully, we can help them reach their unique goals – and achieve the life they envision.

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