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:** Unrealized Opportunities

A husband and wife who considered themselves having blue-collar roots had long careers in an often ethically challenged working environment. Over the years, they'd accumulated meaningful assets – such as a lake house – yet never considered themselves wealthy. They also weren't quick to trust others, due to the husband's decades-long "watch-your-back" career.

Once ready to retire, the couple moved from the Northeast to North Carolina to be near their children's families.

When addressing their finances, they had little investment or management experience, preferring a "money in a shoebox" mentality to keep things private. As a result, they had barely received professional financial guidance and had missed years of investment opportunities.

With no previous disciplines in place to help them to grow their money – and with uncertainty as to how to move forward – they needed trusted, consistent support that could put them on track. They just didn't know where or how to start.

2 **The Opportunity:** Caring, Supportive Guidance

Our Financial Advisor Rick McElroy met the couple, and after learning about their circumstances, knew he could help.

With strategy and forethought, they could grow their wealth through investing. He saw a variety of opportunities to help them strengthen their financial lives, such as:

- **Focus on growth:** Rick knew they needed to commit to a reasonable discipline for achieving moderate growth. He helped them develop the trusting relationship that made that commitment possible.
- **Align their financial goals:** Rick helped them look at the various pieces in their financial life and connect how they work together. From there, he helped them create a plan of action correlated directly to the goals they wanted to achieve in retirement.
- **Delegate responsibilities:** Rick wanted the couple to overcome their trust issues, trust completely, and feel comfortable with professional support. He helped them understand the role financial advisors serve and how a professional looking out for their best interests could better protect their financial lives.

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Building the **Right** Relationships

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

3 **The Outcome:** Decades-Long Relationship

What started as a goal to put their financial life on track turned into a decades-long advisory relationship and friendship. Now, the couple are in their 80s and have successfully navigated the challenges and opportunities that arise later in life. Along the way, they've looked to us for collaboration, leadership, and coordination with their other professional advisors and contacts.

Most importantly, they are developing a plan for how to pass on their legacy to their children with care and in the ways that matter to them.

By learning to trust, delegate, and invest in their futures, they've built a better life of prosperity for themselves and their loved ones.

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