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:** Lack of Proactive Wealth Management

A professional woman in the prime of her career received substantial investment assets in an amicable property settlement. For years, she had deferred financial and investment matters to her husband, so she could concentrate on her work and family. As a result, delegating all financial matters left her in the dark about her wealth management needs and priorities: She didn't know her net worth, had no experience managing financial assets nor prior budgeting strategies.

With a settlement to manage, she knew she needed to understand the reasons behind her financial decisions. She received a referral to our team, as she worked to strengthen her next chapter.

2 **The Opportunity:** A Personalized Strategy

As a natural delegator, our client now had an ally she could rely on to help her manage her financial pieces.

Our first step was to truly understand her financial standing and build her specific investment discipline. Education and perspectives drove our conversations.

Together, we identified her net worth and explored the investments she held. Upon doing so, we uncovered that she was in "pooled" portfolio accounts. Rather than investing for her specific needs, she was simply one of many invested into the same strategy.

She worked with our team to better understand the value of personalized financial strategies. From asset allocation to tax considerations and beyond, we explored the various opportunities available to help her protect her wealth. By doing so, she gained financial clarity.

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Building the **Right** Relationships

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

3 **The Outcome:** A Sound Financial Path Forward

For the first time, our client designed the personalized strategies she needed to help meet her long-term goals. From repositioning her portfolio to addressing tax needs and beyond, she was able to preserve her wealth while working toward the future. Her strategies even enabled her to minimize financial risk by paying off her substantial mortgage in full within a single calendar year.

Today, we continue serving as her financial advocate by preparing her to retire with the income she needs to live comfortably – while making charitable giving a priority. She no longer feels in the dark about where she stands financially and enjoys life knowing she's on the right financial path.

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