OUR PROCESS

01. DISCOVERY

We begin this stage during our initial meeting where we get to know one another. We focus on what your specific needs are and what you want your investment capital to do for you.

02. STRATEGY

The primary objective of this stage is to develop an effective, long-term investment strategy that is custom tailored to your unique needs. We then develop a comprehensive plan that outlines the strategy we recommend for long-term success.

03. IMPLEMENTATION

The primary objective of this phase is to successfully implement your investment strategy. By means of constant communication and a highly skilled staff, we strive to make this process quick and easy for you.

04. MONITORING & ADJUSTING

We monitor your accounts on a regular basis to ensure they are still performing in a way that meets their intention. When we discover that your circumstances have changed, or that shifting global markets require a different investing approach, we are quick to make adjustments.

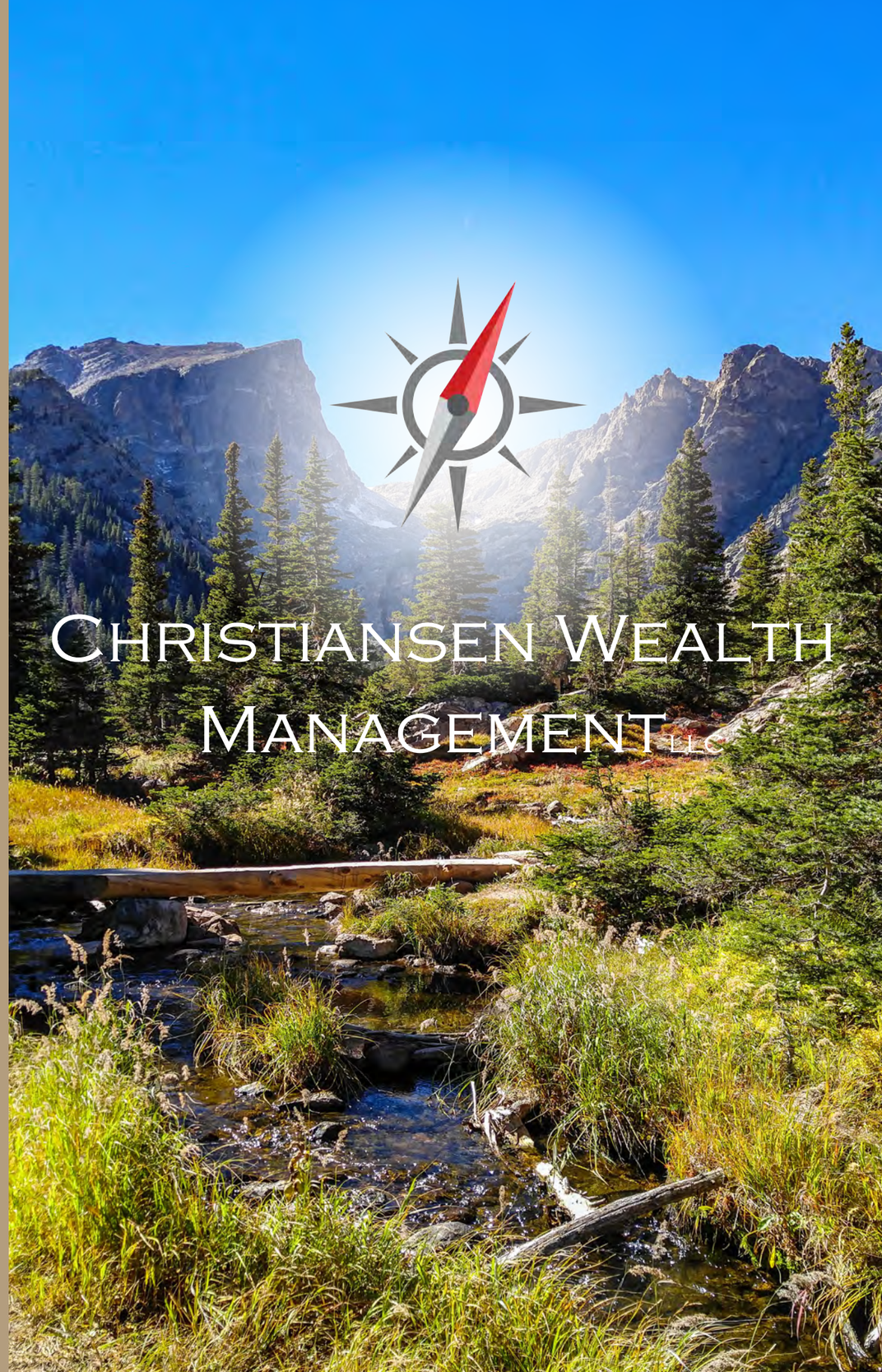
Call us today to see how we can become your partner for success.

CHRISTIANSEN WEALTH MANAGEMENT, LLC

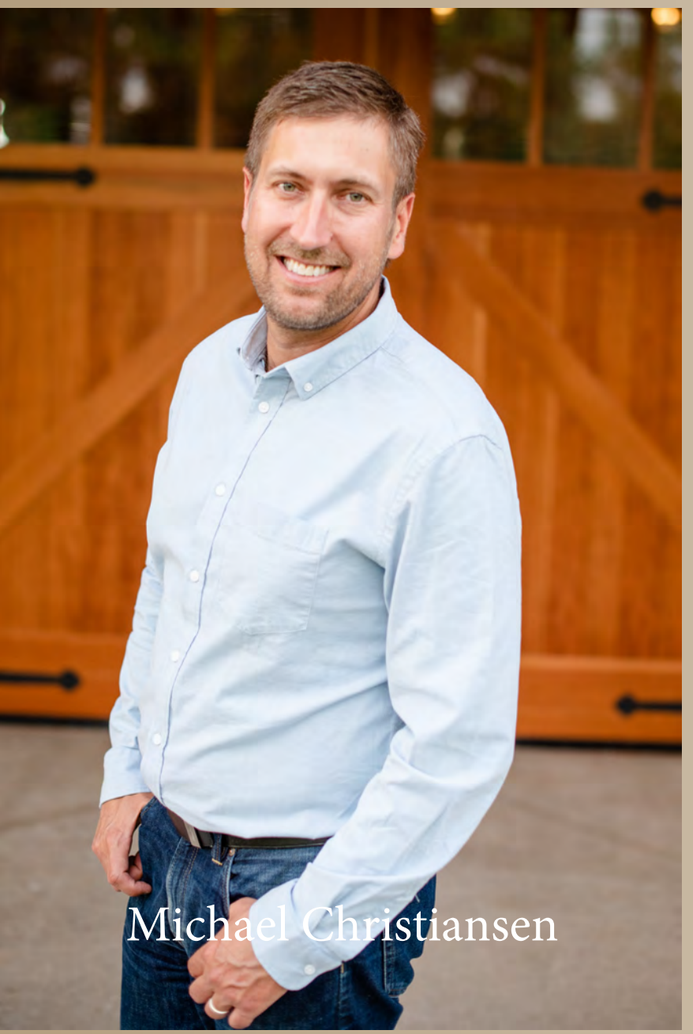
WWW.CHRISTIANSENWEALTH.COM
OFFICE: (970) 776-3280
CELL: (970) 672-7214

About Michael Christiansen

I have been helping my clients manage their wealth for over eighteen years. As a former engineering professional with Boeing's Rocketdyne division and University of Arizona alumni, I now use my knowledge of financial planning and technical analysis to help clients manage risk and invest for the future in all economic environments. Christiansen Wealth Management understands the importance of building personal relationships with clients in addition to providing maximum investment freedom, objective research and emphasizing strategic asset allocation.



> “I believe that the best way to make money is to avoid losing it in the first place.”



Michael Christiansen

About Christiansen Wealth Management

Here at Christiansen Wealth Management, I only focus on one thing: The needs of our clients. I pour every ounce of effort I have into developing, implementing, and monitoring investment strategies that will help our clients meet their financial and lifestyle goals.

I believe in thinking “outside the box” and am not afraid to challenge conventional wisdom in my approach to investing and preserving wealth.

Why Choose CWM?

Whether or not to establish a relationship with a wealth advisor is a decision that deserves careful consideration. Here are some of the reasons why you can feel confident choosing Christiansen Wealth Management, LLC:

Valuable Experience

Because over ninety percent of our clients are in their working years with similar concerns, we are in an ideal position to help meet their needs. When you choose Christiansen Wealth Management, you benefit from obtaining comprehensive advice from a highly qualified professional who has managed money through some of the most difficult times in history including 2000-2003 and 2008-2009.

Disciplined Asset Management

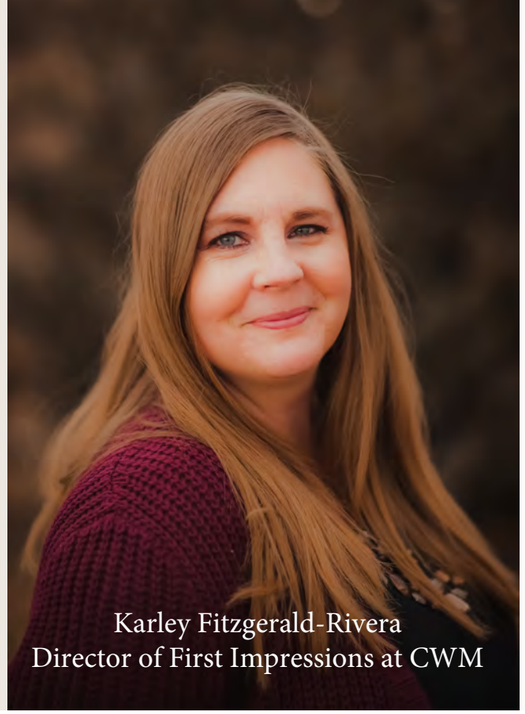
I am an active risk manager who builds durable, all-weather portfolios to help clients fulfill their long-term financial goals. My seasoned investment managers follow sophisticated and disciplined strategies to help you build your wealth while carefully managing risks in all market environments. Our experience shows that better results may be achieved when key financial areas are integrated into the wealth management process.

Independence & Objectivity

As an independent firm, we represent our clients rather than any particular company. Our independence is vital to delivering objective, unbiased recommendations. While some companies recommend investment products that are manufactured by parent or subsidiary business entities, we have no such ties. As an independent financial planning firm, we represent our clients and their interests rather than any specific company.

Cutting Edge Technology

CWM invests heavily in technology to provide high quality tools and to ensure a seamless experience for our clients. Our clients love having access to all of their accounts in one place.



Karley Fitzgerald-Rivera
Director of First Impressions at CWM

Dedicated to Your Success

Diverse Offerings

My combination of licenses, registrations, and professional designations, AAMS & CRPC, qualify me to work with all types of investments. There is virtually no investment vehicle we cannot utilize if the circumstances call for it – simple or complex. Our process takes a comprehensive approach to planning that incorporates your insurance, legal and accounting needs in addition to your investments. In addition, we offer our clients a variety of valuable services including:

- Comprehensive Financial Lifestyle Planning
- Legacy, Estate, and Philanthropy Planning
- Tax Minimization Strategies
- Risk Management and Asset Protection
- Enhanced Portfolio Reporting
- Frequent Communication and Education
- Client events hosted in partnership with some of the leading names in asset management.