



22260 Haggerty Rd., Suite 160  
Northville, MI 48167  
T 248.378.1200  
F 248.378.1200

FOR IMMEDIATE RELEASE:

Carmela Eastin

[carmelaeastin@greatlakeswealth.us](mailto:carmelaeastin@greatlakeswealth.us)

Ph: (248) 378-1200

## **JUST ANNOUNCED – Invest with Great Lakes Wealth & They’ll Donate Half Their Fee to Your Charity!**

*-Northville Investment Firm Will Donate Part of Their 2021 Management Fees to Various Local Non-Profit Organizations Throughout Southeast Michigan-*

NORTHVILLE, MI – Great Lakes Wealth, a local Registered Investment Advisory Firm, believes that giving back is an important part of being in a community. They strive to be leaders and partner with organizations that can make a difference in helping neighbors in need. The current COVID-19 pandemic has actually created many investment opportunities for investors, while other families in our community are struggling now to just make ends meet.

Beginning today, for any **new client accounts opened** or **deposits made from existing clients** between October 15, 2020 – December 31, 2020, GLW will donate up to 50% of their 2021 management fee to local charities!

“We want to not only encourage the community to take advantage and invest in their futures, but to also help our neighbors in need,” said Dewey D. Steffen, CEO/Chief Investment Officer at Great Lakes Wealth. “We are also including a free goals-based financial plan to any new clients or existing clients during this promotion, as well.”

### **The Details –**

- Promotion is valid for new deposits only from October 15, 2020 – December 31, 2020.
- **New Clients** – Minimum deposit \$100K into any of our 12 investment models.
- **Existing Clients** – Add a minimum \$50K into any of our 12 investment models.
- **Existing Clients** – Refer us a new and qualifying client (detailed above) and receive same offer.
- **Both New & Existing Clients** – Receive a complimentary goals-based financial plan review including retirement planning, college planning, insurance planning, or estate planning.
- This promotion is not valid with any other offers and is non-transferable.
- Available to U.S. residents only.

### **We are proud to partner with the following organizations for this limited-time investment offer:**

**American House Foundation** – Work to improve the quality of life for senior citizens who are living at or below poverty level. American House Foundation invests in outreach techniques and research to provide immediate resources to seniors in need. Visit <https://www.americanhousefoundation.org/> to learn more.



22260 Haggerty Rd., Suite 160  
Northville, MI 48167  
T 248.378.1200  
F 248.378.1200

**Forgotten Harvest** – Dedicated to relieving hunger in Southeast Michigan, Forgotten Harvest rescues food surpluses at grocery stores, restaurants, and more, that would have otherwise been thrown out. They repackage and disperse the food throughout the community to those in need. Visit <https://www.forgottenharvest.org/> to learn more.

**Defender Mobility** – An organization on a mission to change the future of the United States' disabled veterans. They work to raise funds to donate brand new, all-terrain wheelchairs to give disabled veterans some of their freedom back. Visit <https://www.defendermobility.com/> to learn more.

**Beaumont Children's Hospital/Children's Miracle Network** – Part of Beaumont Health and the only CMN partner hospital in southeast Michigan, BCH sees 200,000 children and teens each year. Specially trained, in-house pediatricians, nurses, and clinicians oversee care at Beaumont Hospitals in Royal Oak, Dearborn, Farmington Hills, Grosse Pointe, Trenton, Troy, and Wayne, as well as outpatient care across the region. Visit <https://www.beaumont.org/services/childrens> and <https://www.beaumont.org/services/childrens/about/childrens-miracle-network> to learn more.

**Other charity of your choice** – Have an organization in mind? We are more than happy to donate to a specific charity of your choice. Just let us know which one it is. Certain restrictions apply.

For additional information or to take advantage of this promotion, please visit our website at <https://www.greatlakeswealth.us/donate-half-our-fee-to-charity> or call our office directly at (248) 378-1200.

### **About Great Lakes Wealth**

Great Lakes Wealth is an Independent Registered Investment Advisor (RIA), who proudly serves clients by combining Wall Street solutions with Main Street values! Great Lakes Wealth offers goals-based financial planning, strives for best-in-class asset management solutions and provides concierge-style client service. Great Lakes Wealth's overarching objective is to help each client manage and preserve their wealth, ultimately enjoy their retirement and financial independence, and build a legacy for their loved ones and the charitable causes they support. To learn more about the Great Lakes Wealth advantage, visit:

Website: <https://www.greatlakeswealth.us/>  
Facebook: [www.facebook.com/greatlakeswealth/](http://www.facebook.com/greatlakeswealth/)  
LinkedIn: <https://www.linkedin.com/company/great-lakes-wealth/>  
Instagram: <https://www.instagram.com/greatlakeswealth/>

Great Lakes Wealth, LLC is a Registered Investment Advisor. The information provided is solely for informational purposes. Advisory services are only offered to clients or prospective clients where Great Lakes Wealth and its representatives are properly licensed or exempt from licensure. No advice may be rendered without a service agreement in place. Securities offered through Purshe Kaplan Sterling Investments, Member FINRA/SIPC Headquartered at 18 Corporate Woods Blvd., Albany, NY 12211. Purshe Kaplan Sterling Investments and Great Lakes Wealth are not affiliated companies.