PERSONAL CFO PLATFORM

EMPOWER YOUR Family Wealth Life

GCG WEALTH MANAGEMENT INC.
EST. 1994

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WELCOME

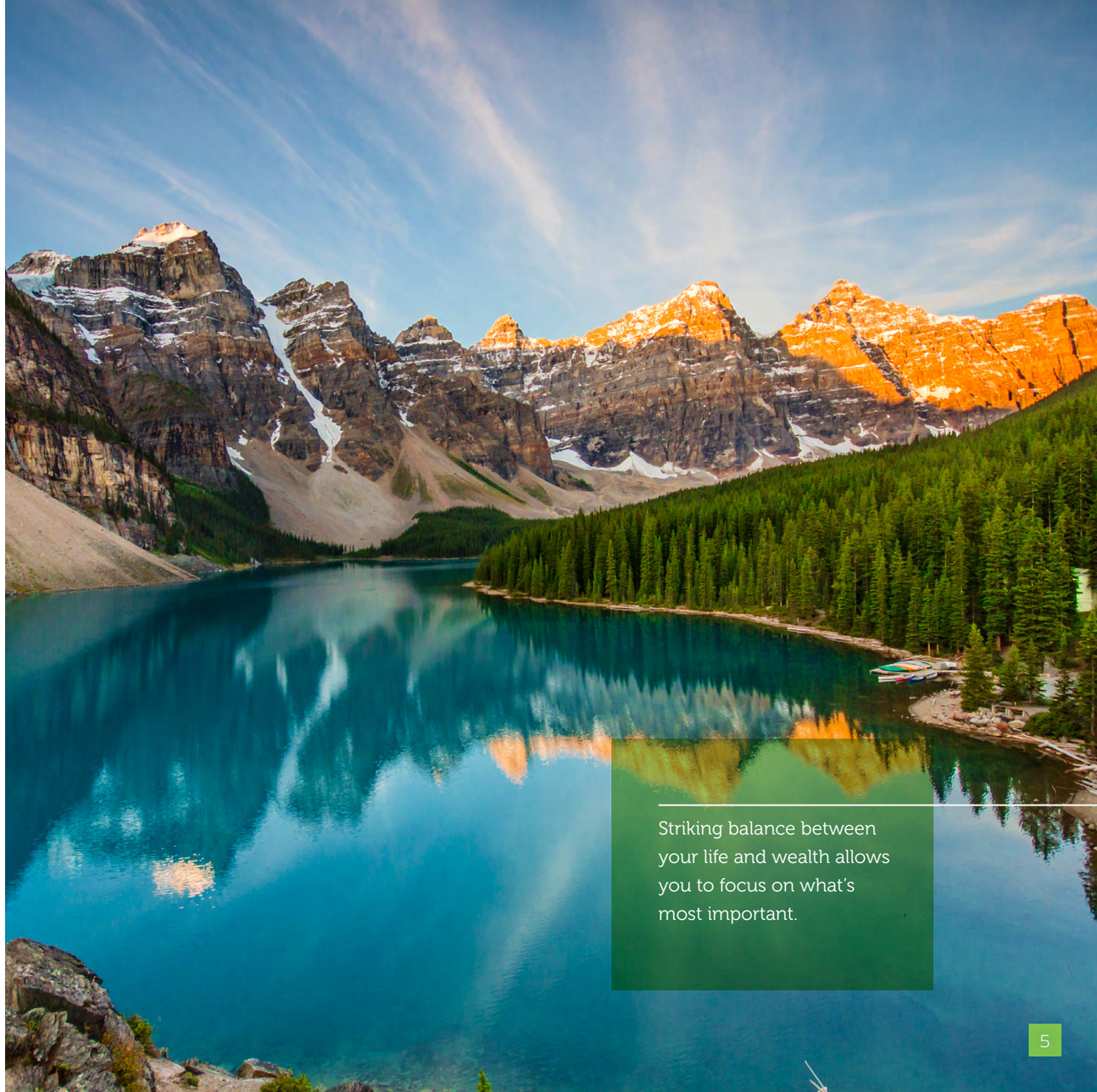
GCG Wealth Management, Inc. is a Charlotte based firm with a strong presence in the area since 1994. Over the years, GCG Wealth Management has evolved along with our clients' ever changing needs. As the financial services industry continues to grow more complex, we strive to simplify things for our clients utilizing a truly holistic approach. Our Personal CFO Solution is an approach to bring all the pieces together, saving you time and delivering better advice. The financial services industry is evolving, and we strive to always be on the cutting edge of what clients want and need. Our innovative process will allow you to clearly define and help build an executable plan for achieving your most important life goals. Click here to watch our YouTube video, 'The GCG Difference.'

TEAM ADVICE

We believe in a team approach to delivering comprehensive advice and execution across a wide range of services. The depth of experience within our advisory team and strategic partners gives you the confidence to know that the advice you are receiving is that of multiple advisors put together in a way that is customized to your life goals. *"One man can be a crucial ingredient on a team, but one man cannot make a team."* – Kareem Abdul-Jabbar

OUR PHILOSOPHY

The Personal CFO solution was built to create harmony between your life and wealth. Money is nothing more than an enabler to allow you to do the things you want to do in life. By managing your entire financial picture, we free up time for you to focus on what's truly important to you – your family, your passions, and in many cases, your business. Our team provides advice in four key areas: Cash Flow Planning, Wealth Accumulation, Risk Management, and Wealth Transfer. The strategies and tactics employed by our team include the common financial services like investments, insurance, estate planning, tax strategy, but also takes on the more unique strategies like asset protection, entity structure, and business consulting. Regardless of the scenario that you are facing, we have the ability to build the best solution customized to your needs.



Striking balance between your life and wealth allows you to focus on what's most important.

THE BASICS OF WHAT WE DO

ORGANIZE AND SIMPLIFY YOUR FINANCIAL LIFE

Utilizing our cutting edge technology, we are able to aggregate all of your assets, liabilities, income and expenses in one place, in real time. We then organize your most important documents into your digital vault so you never have to search for that crucial piece of paper again.

CASH FLOW ANALYSIS

Utilizing that same technology, we are able to identify where your dollars are being utilized and determine the most effective way to prioritize spending vs. saving. Through our quarterly review process, we will collaboratively create the discipline needed to achieve your most important life goals.

TAX PLANNING*

It's not about what you make, it's about what you keep. Our team works with your CPA, or ours, to build a plan before the year starts to ensure we are executing for 365 days every year, minimizing your taxes to the largest degree possible.

WEALTH ACCUMULATION

We believe that each of your goals should be approached independently when it comes to building an investment plan and allocating resources to that plan. As we continue to grow your wealth, we will benchmark the performance of each pool of dollars against the actual goal. This allows us to demonstrate to you how the growth is having a material impact on your life plan.

RISK MANAGEMENT

Growing your wealth is a priority, but protecting and preserving that wealth is equally as important. Our team will analyze multiple areas of risk to ensure you have the proper coverage and/or asset protect structures in place.

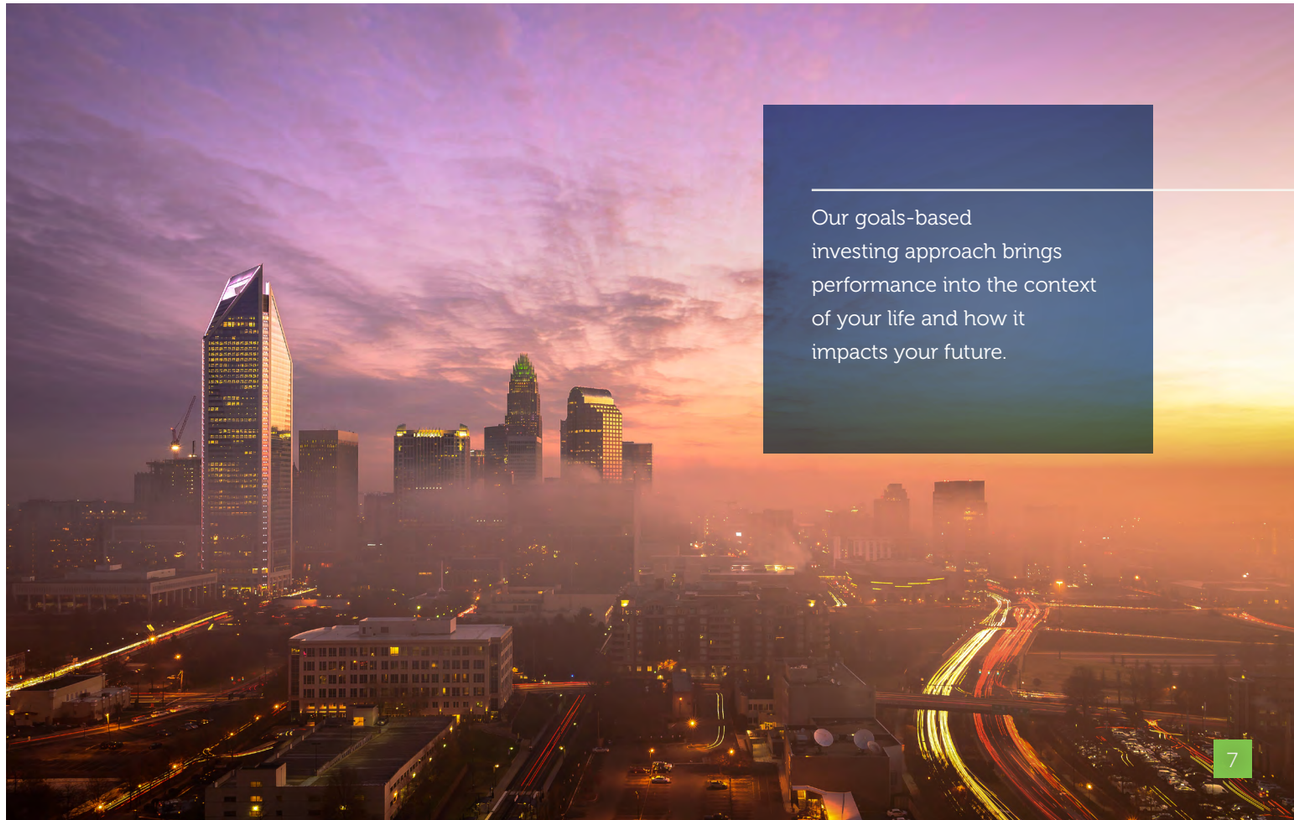
*Neither Woodbury Financial Services, Inc., nor its registered representatives or employees, provide tax or legal services

WEALTH TRANSFER

Unfortunately, life can be unpredictable and we want to always be prepared for any situation that may arise. Our CFO team will build and implement a wealth transfer strategy that ensures what you've built moves smoothly to the next generation or generations. We do this in the most tax efficient way possible to ensure you're making the greatest impact on your loved ones.

BUSINESS STRATEGY

A key strength of our team is bringing together both your business and personal life into one congruent plan. We understand that owning and running a business may be your key wealth creation strategy, and our team can help you take full advantage of the opportunity that it presents.



Our goals-based investing approach brings performance into the context of your life and how it impacts your future.

THE PROCESS

DISCOVERY

The process starts with an in-depth discovery aimed at getting a deep understanding of your life path, passions, financial DNA, and true life goals. Only after we have a full understanding of you will we discuss your financial picture and available resources.

ASSESSMENT

Our experienced team will come together to analyze your entire financial situation and build a plan for both the present and the future. When we deliver your Assessment, we start with what we heard from you, to make certain that we fully understand who you are and what you want out of life. Utilizing our technology, we then show you where you stand today with regard to net worth and cash flow. We then move into our recommendations, which are accompanied by an interactive analysis, visually showing you what it will take to get where you want to be. Finally, there will be a clear action plan outlining exactly what we will be doing for you as your Personal CFO.

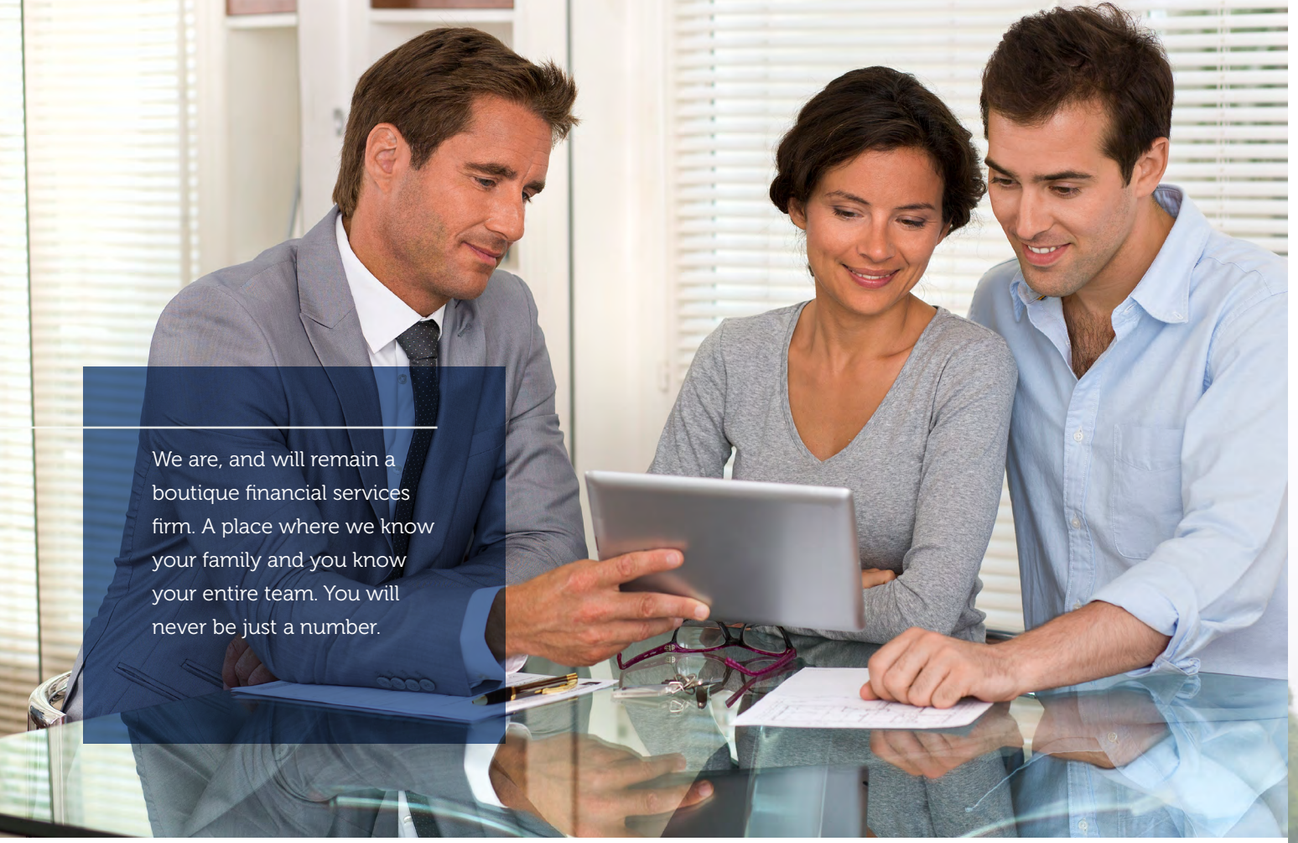
IMPLEMENTATION

The moment you become a client, our team gets to work. You will first receive a more detailed version of the action plan, outlining what needs to be done, who will be held accountable for getting it done, and expectations around timing. You will always know exactly who is doing what and why.

CONTINUOUS MONITORING AND REVIEW

Knowing that your life is dynamic and always changing, we do not feel that an annual review can deliver upon the Personal CFO promise. Our team will sit down with you every quarter, with a specific agenda. This allows us to systematically recognize the dynamic nature of your life and fluidly modify the plan if need be. Through the use of our technology, we get daily updates on your net worth and cash flow that allow us to proactively deliver advice to you.

The Personal CFO service model allows for constant re-assessment to help ensure your plan for the future is always on the right path.



We are, and will remain a boutique financial services firm. A place where we know your family and you know your entire team. You will never be just a number.

THE ULTIMATE CLIENT EXPERIENCE

While our Personal CFO solution is a major step beyond traditional financial services offerings, we set the standard with our exceptional client experience and personalized service model. Everything we do is completely customized to you and your unique situation. Beyond your individual experience, we believe in creating a community within our client base to bring like-minded individuals together in unique ways that foster a sense of community and create additional opportunities for everyone.

Click here to watch our personal CFO overview video on YouTube.

OUR STORY

THE SIGNIFICANCE OF THE BONSAI

The Bonsai tree signifies the stages of life that intertwine to create balance. At GCG Wealth Management, we take every aspect of your financial goals and guide you through the stages of life, whether expected or unanticipated. By way of illustration, the bonsai tree is a reminder of how excited we are to join you on your journey to prosperity and longevity.

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