

How will *you* reach
your financial goals?



Striving to See Dreams Fulfilled

Our team of knowledgeable wealth advisors and service professionals partners with you to develop a clear, actionable plan that helps you pursue what matters most.



OUR MISSION STATEMENT

The team at Covenant Wealth Strategies is a catalyst, striving to build financial security, see dreams fulfilled and create enduring legacies.



Questions To Ask Yourself...

Will I have enough to retire?

How much should I be saving?

Do I fully understand my investments?

Am I prepared for changes in my life?

Do I have someone to guide me when there is change?

Who is monitoring my assets?

Do I have a trusted advisor who will help me pursue my personal dreams and goals?

Do I have someone who will put my needs first?

Do I have someone who is willing to go above and beyond for me?

Strategies For Your Success

At Covenant Wealth Strategies, we're passionate about building client relationships on a firm foundation of trust, experience, and exceptional service. We are committed to helping you pursue financial independence by crafting strategies for your success. Together, we can develop a long-lasting relationship shaped by your goals and enriched by our expertise.



Our Financial Planning Services

We specialize in using customizable core offerings to simplify the complex needs of individual investors, families, small business owners, and corporate executives.



✓ Retirement Planning: We incorporate cash flow, tax, pension, income, and social security strategies to meet your retirement lifestyle expectations.

✓ Investment Planning and Portfolio Management: Through careful analysis, we construct a portfolio adjusted to your risk tolerance, investment objectives, and retirement time frame. Our investment philosophy is to protect and advance our client's interests by conducting extensive industry research, diversifying broadly, and employing alternative investment strategies where appropriate.

✓ Executive Compensation Planning: Our team researches and develops investment optimization strategies for employer sponsored retirement plans including 401ks, stock options, deferred compensation, and pension plans.

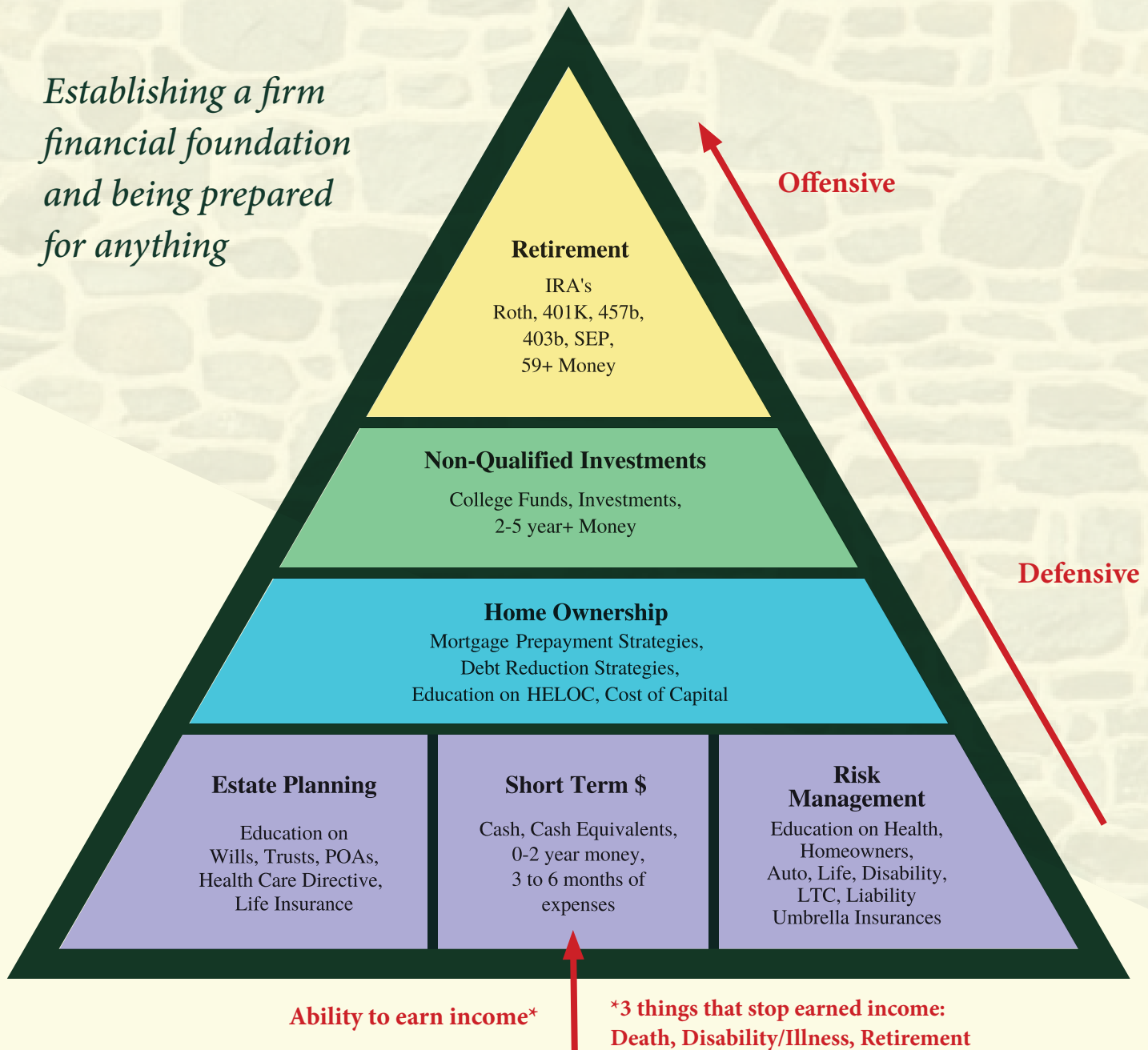
✓ Estate and Legacy Planning: We collaborate with your estate planning attorney to ensure that your documents are up to date and to solidify asset titling and beneficiary arrangements, as well as facilitate multi-generational financial planning.

✓ Risk Management Planning: Our advisors evaluate your present coverage including employee benefits and introduce appropriate risk management resources in the areas of life insurance, disability insurance, and long-term care insurance.

✓ Education Planning: We'll help you prepare for education and college tuition expenses through the use of 529 plans, UGMA accounts, ESA/Coverdell accounts, and other tax-favored strategies.

Building Your Investment House

Establishing a firm financial foundation and being prepared for anything



The Foundation The first level of the Investment House covers those essential and often defensive measures that should be in place before you advance to the next level. These include estate planning, liquid assets and insurance planning.

Home Ownership One of the largest financial commitments the average individual will make is the purchase of a home. We educate our clients on mortgage terms, payment strategies, debt reduction strategies and more to ensure that the biggest decisions of your financial life are made well.

Non-Qualified Investments We introduce our clients to creative strategies to better position their investments, informed by their long-term goals and objectives. For those who want to invest in their children's or grandchildren's educational future, we discuss educational options and strategies such as 529 college savings plans. We also discuss various non-qualified investments, which typically have a time-frame of 2-5 years or longer.

Retirement & Financial Independence At the top of the Investment House we have the topic that many people want to begin the conversation with, "When can I retire?" Here is where we discuss strategies for those resources that you do not plan on tapping into until your golden years, including 401ks, IRAs, Roth IRAs among many others.

Who are your First Five phone calls?

Who do you call when something happens in your life?

...Something **really good** when you want to celebrate or something **really hard** when you need encouragement, support and honest guidance?

- Engagement/Wedding
- Buying a new home
- Celebrating the birth of a baby/grandbaby
- Taking a dream vacation
- Building a beach home
- Accepting a new job
- Receiving a promotion
- Retiring
- Losing a loved one
- Receiving difficult health news
- Losing a job
- Natural disaster
- Divorce
- Injury, disability or accident
- Inability to work



Our goal is to be on your First Five list because we care and because there is always a financial implication.

Our Process

We take a focused and tailored approach to our comprehensive financial planning process that involves understanding your unique financial objectives and designing a strategy that strives to build and preserve your wealth over the course of your lifetime and events.

We work diligently for our clients to earn the opportunity to be a First Five phone call. We understand that this position is sustained through exceptional service. We consider it a privilege and honor to be a First Five.

Our Objective

As a First Five, our objective is to empower, educate and advocate for you in your decision-making process as you navigate your life event.

Partnering with you allows us to live our purpose-driven mission and to act as a catalyst for your future.

Our Company Values

INTEGRITY

We are transparent, putting your best interests first to help you pursue your dreams and what's most important to you.

EXCELLENCE

We set the bar high and strive to deliver pro-active concierge services to exceed your expectations.

EMPATHY

We understand the challenges you may face during times of change in your life and we are with you through them.

WISDOM

We believe our combined years of experience and extensive industry knowledge gives us the wisdom to best serve you.

Your Trusted Advisor

Our goal at Covenant Wealth Strategies is to be your trusted advisor by offering **professional wisdom, integrity, and personalized service.**

We are **committed to building and maintaining a long-term relationship with you**, giving you and your financial needs the attention they deserve.



Our Foundational Pillars

Covenant Wealth Strategies' four pillars provide a solid foundation and unwavering commitment to your financial security.

PRO-ACTIVE CONCIERGE SERVICE

*Exceeding
Expectations*

*Delivering
Excellence*

*Celebrating
Success*



INDEPENDENT ADVICE

*Providing Honest
Guidance*

*Creating
Strategies*

*Broadening
Visions*



STEWARDSHIP

*Discovering
Opportunities*

*Delivering
Valuable Advice*

*Doing What's
Right*



FINANCIAL LITERACY

*Providing
Educational
Guidance*

*Supporting
Dreams & Goals*

*Empowering
Our Clients*



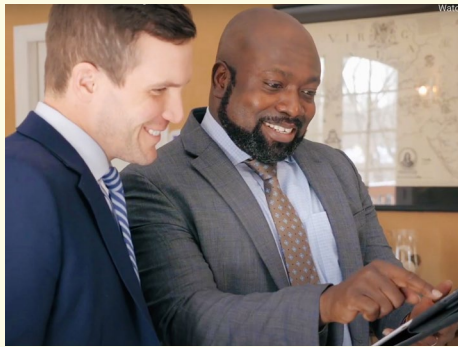
Our team of experienced advisors and associates utilizes both extensive industry knowledge and sound practices to steward your wealth. United by a common set of principles and a client-focused mentality, our goal is to be the responsible professionals you can come to with your questions, your concerns, and your greatest ambitions.



Our Team



Delivering comprehensive solutions to the clients of Covenant Wealth Strategies requires a cohesive team. The advisors and support staff we've assembled possess complimentary backgrounds and skill sets which culminate in exemplary service.



MEET THE TEAM!

Scan the code to visit the Team page on our website to learn more about each member of our team!

www.CovenantWealthStrategies.com/team



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