

Combined Global Investors

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For your Future!

We will invest for your Future!

Why Choose Us?

WE'RE ON YOUR SIDE, FINANCIAL ADVICE FROM ADVISERS WHO CARE.

Combined Global Investors, LLC is a fee-only organization. We provide totally independent and objective advice on your wealth. We act as fiduciaries in our relationship with you and only advise what is best for your situation and goals.

We consult with you regarding your entire personal financial situation to develop an investment plan that is right for you. That plan may be concentrated on your return and mitigating your risk. On an ongoing basis we monitor your portfolio for re-balancing in accordance with our established

Investment Advisor

parameters.

Years of experience have taught us that the personal relationship between a client and their advisor is critical for success. We are able to offer the type of personal relationship we know you want.

We happily service clients in the United States and Americans living abroad as well as those who have returned to the states from their assignments overseas. As a firm with a global presence we can provide a valuable resource to Americans who have lived overseas as expats who may have European assets to consider in their overall portfolio. Repatriated Americans looking to understand how their global mobility lifestyle translates into their wealth management strategies.

US Assets

Are you a U.S connected person?

You may be clear that you're a U.S. Connected Person; we've learned many people are not clear.

You're a U.S. connected person if you are:

- **A United States Citizen**
- **Born in the United States**
- **Born Outside the U.S. of a U.S. Parent**
- **Naturalized Citizen**
- **Green Card Holder**
- **Tax Resident in the U.S.**
- **Filing a U.S. Tax Return**

Investment Advisor

401k

Your 401K can be an important part of your future income. For that reason, it shouldn't be neglected. A lot of people we meet have multiple 401K accounts which are unmanaged. We can consolidate these accounts and manage the portfolio as one. We can report your 401k's and your investment portfolio in one overview, clear for you, a little peace of mind.

MY401K.international

European Assets

International diversification - A different perspective

An internationally diversified investment strategy requires an advisor with a global outlook and a deep understanding of markets around the world and of the trends shaping the international economy.

Are you an American or US connected person with European assets?

We can help cross border Americans with pensions and assets in the euro zone. At Combined Global investors we understand the specific needs of investors with global mobility lifestyles, because we are expats too. With so many moving pieces to your wealth management strategies, we help you realize how the pieces fit together and we focus on helping you with your retirement goals.

Contact

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