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GUARDIAN WEALTH STRATEGIES

## smart investment portfolio.

You need an advisory team who will **coordinate all aspects** of your financial plan."

-Brent Hoppe, Guardian Wealth Strategies



**G** uardian Wealth Strategies is one of the leading independent, fiduciary investment firms in the Minneapolis-St. Paul, MN area. Going beyond simple wealth management, Guardian specializing in integrated financial planning – coordinating a strategic plan that optimizes the way each client's investments, taxes, estate plan and insurance work together.

Each year, Guardian helps hundreds of households, businesses and nonprofit organizations reach their goals through a thoughtful and comprehensive approach to financial planning, and providing conflict-free retirement advice.

# A TRUE PROFESSIONAL PARTNERSHIP

At Guardian Wealth Strategies, you don't just get an advisor, you get an *Advisory Team*. Let Guardian show you the advantages of a true professional partnership.

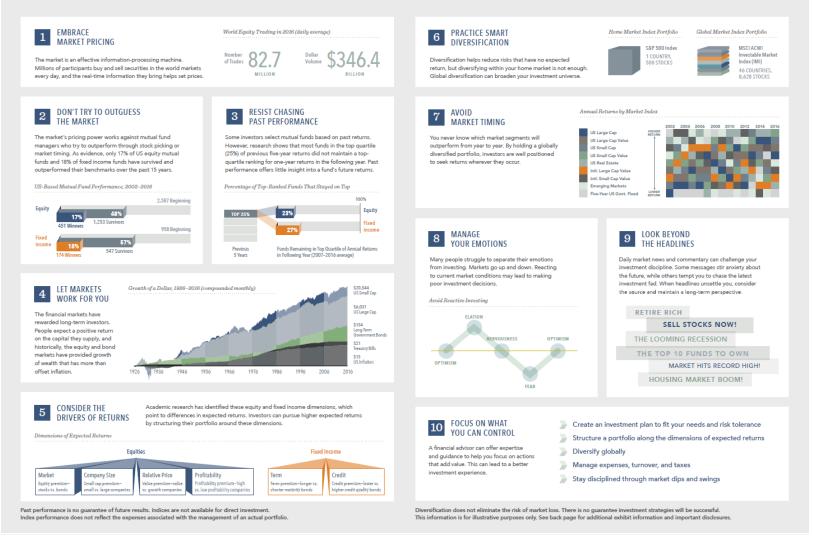
- Fiduciary Advisors: Professional office of investment advisors, CPAs, attorneys and other industry professionals to serve each client. Fiduciary advice in the client's best interest. Collaborative decisions made with thoughtful coordination. NO commission-based sales people.
- Independent and Objective: Independent, conflict-free investment management and financial planning advice. NO proprietary funds. NO revenue sharing. Commission-FREE investments. NO conflicts of interest. Transparent, easy to understand advisory fee with NO contracts.
- Clear and Transparent: Investments held at Charles Schwab, one of the industry's largest and most trusted custodians. 24/7 access to all account details. Consolidated quarterly statements of all accounts bringing clarity to entire investment portfolio.
- In-House Investment Management: Dedicated investment committee actively monitors client portfolios leveraging technology, tax-efficient investments and strategic rebalancing.



investment advisors to coordinate tax targets and projections.

- Retirement Income Integration: In-depth retirement income projections, implementation and oversight.
- Trusted Network: Assistance coordinating other significant life events including real estate, mortgage, insurance, banking, legal and much more.
- Better Value: Low fees. Increased efficiencies. Better outcomes.

## PURSUING A BETTER INVESTMENT EXPERIENCE 10 Key principles to improve your odds of success



CONNEC

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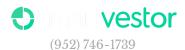
#### SCHEDULE APPOINTMENT

JOIN ONLINE MEETING

## (952) 746-1746

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