



At Ludwick & Shirman, LLC, we combine investment management with broad financial planning to help simplify our clients' financial lives, protect and grow their resources, and help them stay on track to realize their most important goals. We strive to help individuals and families preserve and grow their wealth. Together with clients, we design a vision of their financial future and develop a realistic strategy to achieve their goals.

We are an independent, fee-based financial planning and investment advisory firm based in Boulder, Colorado.

## GET ACQUAINTED

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We offer a complimentary "get-acquainted" meeting to describe

## CONTACT US

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## YOUR ACCOUNT

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TD Ameritrade Institutional provides monthly statements to

our services and to explore  
whether we are a good fit for you.

Email:  
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our clients summarizing their  
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