THE GLOBAL ADVANTAGE

What you can expect when working with Global Wealth Management

- **Concierge level of service**

- **Each client receives the following account management services**

  - Client Service Manager, Financial Planning Support Team, and a Lead Financial Advisor

  - Our Financial Advisor Team:
    Andrew Costa
    Amber Kelly
    Chad Hill
    Grant Conness
    Jon Wolff
    Richard Gionnotti

  - Our Relationship Manager and Service Team
    John Thomas
    Dave Olsen
    Kyle Kelly

  - Chief Market Strategist
    John Thomas

  - Financial Planning Department Partnership through GFPC staffed with Certified Financial Planners (CFP)

  - Custodial relationship via Fidelity Institutional Wealth Services

  - Account reporting service via E-Money

  - Discounted tax return service* (Services offered through Santini & Sedawie, P.A.)

  - Discounted estate and legacy planning services (Services offered through Law Offices of Cosculluela & Marzano, P.A. and Law Offices of Elliot Borkson)

- **Access to exclusive, invite-only client events**

  - GWM client-guest socials and educational forums

  - GWM client-guest movie or theatre events

  - GWM client-guest monthly Lunch-N-Learn series

  - GWM annual client-guest luau

  - GWM annual holiday party

  - GWM day at the ballpark or other sporting events

  - GWM quarterly investment symposiums

  - GWM annual State of the Market event

  - GWM bi-annual State of the Market events

- **Weekly market update calls – with John Thomas, Vice President of Client Services**

- **Weekly market update emails GFPC's "Thought of** the Week”

- Bimonthly “Global Wealth Report” newsletter
- Biannual account progress reviews
- We make available to our clients the Quarterly Market Updates from our partner GFPC’s Chief Investment Officer Chris Bertelsen and Chief Market Strategist Mike Sorrentino
- Periodic notifications via email/social media of media appearances (Fox Business, CNBC, Bloomberg, Wall Street Journal and other sources)
- Online access to Fidelity.com and E-Money to review daily reporting and viewing
- Monthly account statements from Fidelity Investments
- Access to GWM Client Concierge Desk
    - Travel and Cruise Agency
    - Real Estate Professionals
    - Mortgage and Lending Professionals
    - Legal
    - Tax
    - Health Care and Long-Term Care Providers
    - Medicare Assistance and Planning
    - Concert, Theatre, and Sporting Event Tickets
    - Transportation and Limo Services
    - South Florida Restaurant Guide and Reservation Services
    - IT, Computer, Technology Services
    - Notary Services
    - Car Purchasing Made Easy

GLOBAL
WEALTH MANAGEMENT

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