

# THE GLOBAL ADVANTAGE

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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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