

## THE COMPONENTS OF WEALTH MANAGEMENT



### 1 Golden Gate Wealth Management Team

The two towers represent the two generations of financial advisors who are here for you and your family.

### 2 Wealth Management Plan

The roadway represents all the phases of wealth management you'll experience along your journey: wealth accumulation, wealth preservation, wealth distribution and wealth transfer.

### 3 Wealth Planning

The suspender cables represent the comprehensive financial guidance we'll provide for every important matter such as, college planning, retirement planning, estate planning and charitable giving.

### 4 Portfolio Management

The main cables that link the towers and support the bridge represent how your wealth management plan is backed by prudent portfolio management, designed to help you enjoy a sense of stability and confidence as an investor.

### 5 Risk Management

The guard rails represent barriers from risk – to help protect you and your family from unforeseen events such as illness or disability.