THE GD S EXPERIENCE

A 3 Step Approach to Build Your Financial Future

Initial Phone Call

Discovery Meeting

Review
Customized
Plan

Become a Client

3

6 Yearly Touch Points

> Formal Review

Formal Review

- About You
- About Us
- About the Process

- Your Goals
- Our Approach
- Expected Outcome
- Questionnaire
- Present Plan & Adjust as Necessary
- AssetsTransferred &Invested
- Quarterly Phone Calls
- Semi-Annual Account Review
- Client Appreciation Events

*Complementary financial plan valued at \$5,000.







YOUR TEAM. YOUR PLAN. YOUR FUTURE.

Client Billing	Fee-Only	
Follows Fiduciary Standard	Yes	
Commissionable Products	None	
NFLPA (NFL Player Association)	Yes	
Owned by a Bank	No	
Number of CERTIFIED FINANCIAL PLANNERS® (CFP®)	10 +	
Customer Disputes	None	
Conflicts of Interest	None	
EverSafe®	Yes	
ClearMatch	Yes	

TRY ASKING OTHER FIRMS THIS INFORMATION!

Forbes Best-In-State 7 Years +



WINNER	NER	NER
BEST OF DENTON COUNTY 2024 MURRAY MEDIA GROUP	TOF TON NTY 23	TOF TON NTY 22 EDIA GROUP
Committed to Community Excellence.	munity Excellence.	nmunity Excellence.





