

REDW Stanley

REDW Stanley
Financial Advisors LLC
An SEC Registered Subsidiary of REDW The Rogoff Firm

INTEGRITY COUNTS.

CERTIFIED PUBLIC ACCOUNTANTS | BUSINESS & FINANCIAL ADVISORS

505.998.3200 | REDW.COM

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6401 Jefferson Street NE, Albuquerque, NM 87109

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HOW WOULD YOU LIKE TO BE CONTACTED?

Name _____

Address _____

City _____

State and Zip _____

Phone _____

Mobile _____

Email _____

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PLEASE SEND ME INFORMATION ABOUT:

Asset protection planning

Charitable giving

Executive compensation planning

Estate and trust services

Income tax planning

International planning

Investment planning

Retirement planning

Risk management planning

Planning for life changes

Portfolio management

Customized portfolio analysis

Concentrated equity position strategies

Tax consequences analysis

Alternate dispute resolution

Expert witness investment and planning

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HOW CAN WE HELP YOU?

Having money and knowing how to manage your financial life are two different things. Financial planning isn't taught in most schools, yet nothing has more impact on the quality of life for you and your family.

The most effective client-advisor relationship is that of an informed partnership. The more you know, the greater your control over your financial future, and the more we can help you help yourself. We communicate in plain language to increase your understanding and make you aware of the options available. We help you see where you are, help you decide where you want to go, and show you how to get there.

Our services include wealth management and analysis, investment advising, asset protection strategies, tax consequence analysis and much more.



WHERE ARE YOU NOW?

The process begins with listening. We use questionnaires and interviews to get to know you. Once the interview process is complete, we mutually decide how to proceed...what is to be included in the plan, how detailed reporting is to be, and how much it might cost. If we both decide to proceed, we'll request very specific information from you. The appropriateness of our recommendations will depend on the quality of your information.

WHERE DO YOU WANT TO GO?

You tell us where you think you are and where you want to go. We'll help sort through and prioritize goals and objectives to bring your financial life into focus.

HOW WILL YOU GET THERE?

This might be very complex and detailed or very simple with global recommendations. You tell us and we'll deliver it to you the way you want it. But for sure: it will be in writing and communicated in language you understand; it will be our objective advice with only you in mind; and we'll educate you along the way.

ARE WE THERE YET?

If not implemented, your plan is only an expense and has little value. We are happy to work with you and your other advisors to implement recommendations and monitor your progress. Together we define how this is best accomplished. To find out more, please fill out the enclosed form and place it in the mail or call us.

CONTACT:

Ginny Stanley

505.998.3216

gstanley@redw.com

Chip Denny

505.998.3234

cdenny@redw.com



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Albuquerque, NM 87109

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