



STRATEGIC WEALTH
DESIGN

Financial Security and
Financial Freedom

strategicwd.com

Who We Serve



Physicians



Business Owners



Dentists



Retirees & Pre-Retirees

What We Do



FINANCIAL
ORGANIZATION



TAX
PLANNING



INCOME &
ASSET PROTECTION



CASH FLOW
MANAGEMENT



RETIREMENT
& LEGACY

Solutions We Implement



Financial Planning



Wealth Management



401(k)/403(b) Plans



Insurance Solutions

Planning Strategies

for Every Stage

Growth Phase

- Cash Flow Management
- Debt & Student Loan Management
- Investment Management

Retirement Phase

- Income Planning
- Tax-Efficient Withdrawals
- Legacy & Philanthropy

Business Owners

- Exit & Succession
- Tax & Entity Structures
- Executive Benefits



Personalized
Planning
Starts Here

Experienced Advisors | CFP®, ChFC®, AIF®, CPFA®, FPQP®, APMA®, CRC®

Offices in Las Vegas, NV and Glenwood Springs, CO | *Serving clients nationwide*