

# INVESTMENT MANAGEMENT & FINANCIAL PLANNING

## Gary Webb Registered Financial Consultant™

Gary is Chief Executive Officer and Partner of Webb Financial Group, an Independent SEC Registered Investment Advisory Firm and has been in the business since 1998.

At Webb Financial Group, we put the creation of your wealth plan at the center of the wealth management process. The fundamental purpose of a well-designed wealth plan is to determine how your financial resources can help you achieve your personal, family, business and philanthropic goals.

Each plan is custom-tailored by wealth-planning professionals who work to design a long-term roadmap based on your specific goals, resources, relationships, values and commitments. Your wealth plan will cover a wide range of topics concerning the management of your wealth including cash flow analysis, debt management, tax planning, insurance planning, asset allocation, investment management-diversification, management of financial assets, and estate planning.

- Your unique situation is comprehensively and systematically analyzed.
- Your plan is crafted by what we learn from you; our advice helps you meet your goals and objectives.
- Your continued progress is how we measure our success.

### Areas of Wealth Management:

- Day-to-Day Finance & Debt Management
- Personal Savings & Cash Reserves
- Personal Risk Management
- Retirement Planning
- Identify Your Goals
- Estate Planning
- Educational Planning

### Webb Financial Group, a trusted partner

You can depend on the experience and substantial internal resources of Webb Financial Group and our coordination working as a team, with your other advisors – your attorney, tax advisor or CPA – to keep your wealth plan focused on a common goal.

### Education & Licenses

Registered Financial Consultant™  
State of Minnesota Notary Public Commission  
State of Minnesota, Life & Health Insurance Agent  
University of Minnesota , Liberal Arts  
Northwestern Electronics Institute, Computer Degree  
Member of the Financial Planning Association  
Member of the International Association of Registered Financial Consultants

### Experience

Investment Advisor-Financial Planner, Webb Financial Group since 1998

### Recent Media Features

- Smart Money
- Wall Street Journal Radio
- Sacramento Bee
- Star Tribune
- Business Week
- Minneapolis/St. Paul Business
- AM Best Week
- CNN Money

For full access to Media Features go to  
[www.webbfinancial.com/media.html](http://www.webbfinancial.com/media.html)



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