











The business of GPC is people and their financial well-being. Our objective is to serve you effectively, efficiently, and distinctly – whatever your financial and investment needs. We want you to understand the investment process and your rights as an investor so that we may provide you with investment choices, and services designed to help you attain your financial objectives.



# Our Comprehensive Analysis...

## **Investment Analysis**

We examine your portfolio, looking for ways to ensure it accomplishes your financial goals and dreams.

**Performances**

**Risk Factors**

**Fee Exposure**

## **Tax Diversification Analysis**

We are experts in helping you create a more tax-efficient portfolio.

**Tax Allocation Models**

**Tax-Advantaged Products**

**Tax-Advantages Strategies**

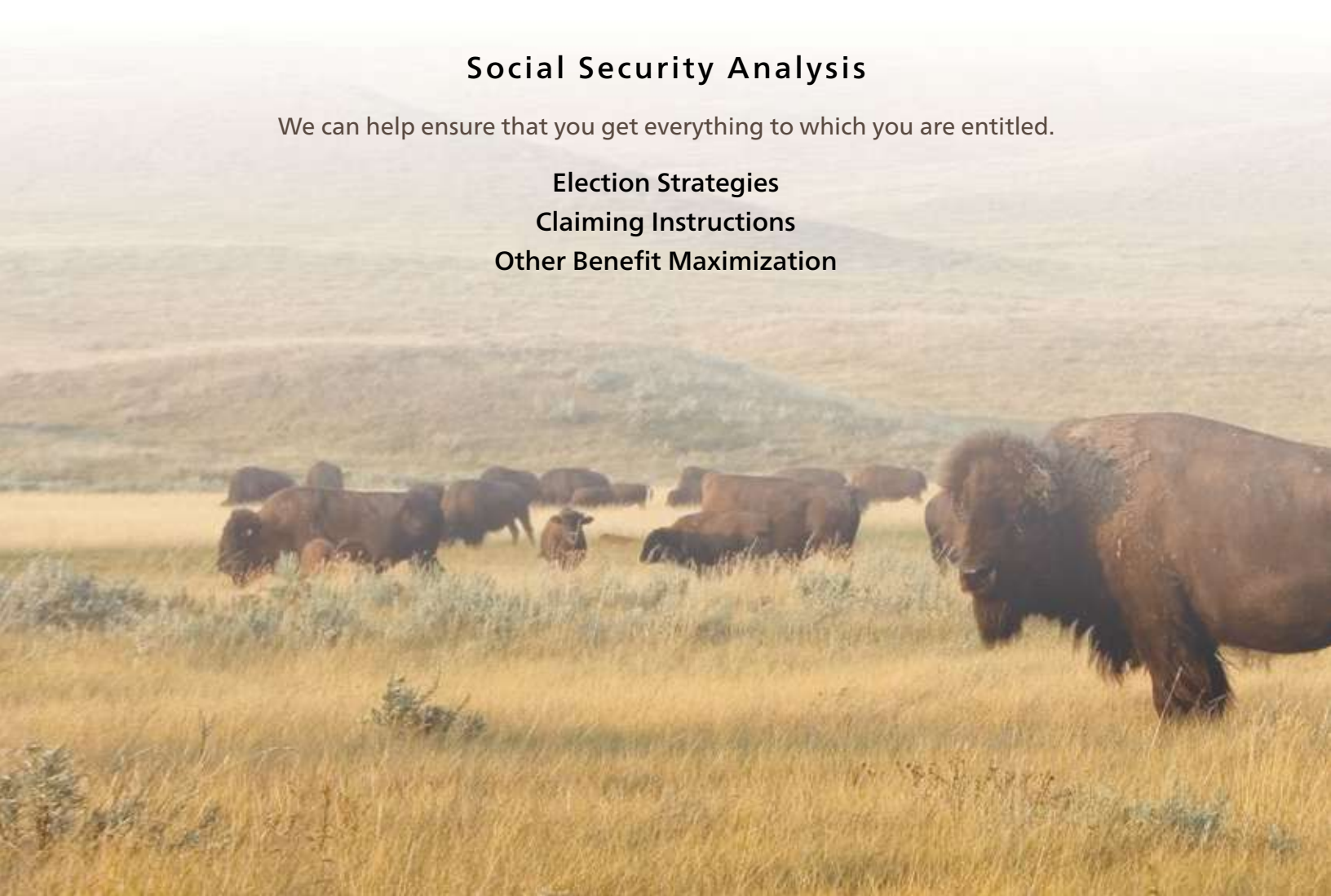
## **Social Security Analysis**

We can help ensure that you get everything to which you are entitled.

**Election Strategies**

**Claiming Instructions**

**Other Benefit Maximization**





## **Retirement Analysis**

After all your hard work, we want to make sure you get the relaxing retirement you deserve.

**Budgeting**  
**Inflation Factors**  
**Tax Liabilities**

## **Long-Term Care Analysis**

We provide alternate outside-the-box solutions to this incredibly expensive risk.

**Needs Analysis**  
**Traditional Solutions**  
**Asset-Based Solutions**

## **Business Analysis**

We know how important it is to protect and grow your most valuable asset.

**Tax-Advantaged Strategies**  
**Employee Benefits Solutions**  
**Retirement Plan Options**







## Our Holistic Process...

1

### ***Establish the Relationship***

Scope of Engagement  
Compensation Structures  
Time Frames  
Responsibilities

2

### ***Gather Client Data***

Quantitative (numbers)  
Qualitative (dreams)  
Risk Tolerance  
Statements, Contracts, Documents

3

### ***Analyze Data***

Software Analysis  
Human Analysis  
Specific and Detailed  
Time Sensitive

6

### ***Monitor the Plan***

Ongoing Reviews and Revisions  
Account Consolidated Portal  
Economic Triggers  
Financial Checklist

5

### ***Implement the Plan***

Prioritize Action  
Timing Transition  
Establish Accounts  
Initiate Connections

4

### ***Develop a Plan***

Objective and Unbiased  
Comprehensive  
Customized  
Client-Centric



# Our Customized Strategies...

## ***Estate Preservation***

At GPC, we understand that with the blessing of success comes the curse and complexity of protecting that blessing. Estate preservation encompasses a wide range of factors including wills, trusts, beneficiaries, property ownership, powers of attorney and specific final arrangements for an estate or business. These aspects can be hard to navigate alone without a plan to put into action. Our firm works to help conserve the wealth and success of our clients by offering specific estate preservation strategies to ensure that they accomplish their goals regardless of predictable or unforeseen circumstances.

## ***Risk Management and Insurance Strategies***

Assessing risk is a strategic measurement process; it can change on a dime and have devastating effects if not handled properly. The GPC team understands that there is no point in working diligently to create wealth if it can be lost in a moment. Our focus is making sure our clients are protected through our robust and comprehensive insurance and risk management platform. In any investment situation there are times of uncertainty, especially with a volatile financial market, but our clients can rest assured that their team of experienced professionals is prepared for any scenario.



## ***Retirement Preparation***

With the variety of options, the complexities of different plans, and the uncertainties of longevity and inflation, retirement may seem like more of a burden than a joy. Through GPC's dynamic and holistic approach, we are able to offer consistency and confidence to our clients through every stage of retirement preparation. In the first stage (the accumulation or contribution phase), we offer asset allocation and tax strategies to assure that our clients reach their retirement goals. In the second stage (the distribution or income phase), we offer budgetary and income strategies to track and adapt retirement income strategies, ensuring that our clients will not only make it to retirement, but through retirement as well.

## ***Corporate Executive Strategies***

At GPC, we understand that corporate executives and key employees have limited time to organize and insure their corporate benefits. Our program helps ensure that these executives and key employees take full advantage of all the features and benefits available to them through their companies. We focus on implementing these strategies while helping decrease their involvement, effort and time spent doing so.



### ***Business Risk***

There are many complexities when it comes to running a business; marketing/branding, human resources, research and development, competitive analysis, etc. At GPC, we help business owners protect and grow their most valuable asset - their business. By offering a full suite of customized business strategies and plans, we are able to take the business owner's focus off the financial aspect of their enterprise. This way, they can concentrate on what they do best; growing and developing their company.

### ***Employee Benefits***

Businesses often implement retirement and health benefits to attract and retain talented employees. At the same time, these businesses may achieve corporate goals such as harmonization of risk, increased coverage and protection, lower administrative and risk-based costs, and significant tax benefits if their employee benefits are properly structured. At GPC, we help our business clients navigate this complex and highly regulated financial environment.





## The Quality Companies We Represent...

We work with some of the most stable and reputable financial firms in the industry to bring our clients quality financial products they can depend on. At GPC, we take great pride in the association and relationships we have developed to better service our clients' financial needs.







**Contact us at 701-591-0200  
to arrange your complimentary consultation  
with one of our experienced professionals.**





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