GEIER ASSET

Geier Asset Management, Inc.

Commitment ~ Excellence ~ Reputation

A registered investment advisory firm specializing in helping individuals and families to determine what is most important in their financial lives, identify short and long term goals, and create the optimal plan for achieving this state of comfort and security.

A large portion of our client base consists of baby boomers and retirees due to our conservative investing philosophy and our ability to preserve capital in favorable as well as hostile market environments.

Who is Geier Asset Management, Inc.?

Geier Asset Management, Inc. is an Investment Management and Financial Planning firm established in 1999 and registered with the Securities and Exchange Commission as a Registered Investment Advisor. Our Securities and Exchange Commission file number is 801-56955.

Geier Asset Management, Inc. provides high quality, professional expertise in wealth accumulation and preservation for individuals and families leading active and sometimes complex lives. Additional clients may include businesses, corporations, 401(k), pension, and profit sharing plans, estates, and trusts. GAM is also the advisor for the Geier Strategic Total Return Fund (GAMTX).

What services are provided by Geier Asset Management, Inc.?

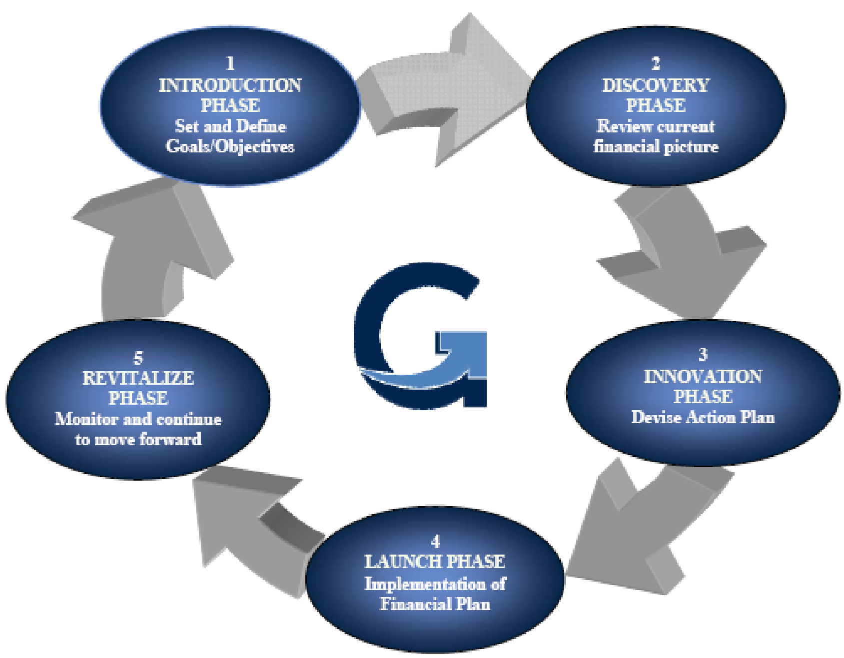
- Investment Management /Planning
- Cash flow & budgeting
- College funding
- Retirement planning
- Financial plans
- Estate planning
- Inheritance guidance
- Risk management
- Insurance
- Pension plan review/consultation
- 401(k) plan review/consultation
- Tax planning & preparation
- Refinance analysis
- Charitable planning
- Business advisory services

…..and more

What is the prospect to new client experience like?

We want to ensure we are a good fit for you and vice versa. To ensure success, we need to know there is good alignment between our philosophies of investing and finance, and your expectations of a financial advisor and partner.

The first step is setting up a meeting in our office with a few members of the Client Management team. This is an opportunity to ask and answer questions, get to know each other better, and learn how we can best serve you. Some prospects make the decision to work with us during this meeting, and others request more information and/or a second meeting to learn more. Once a decision has been made to work with us, we utilize the following process.



How will working with a financial advisor benefit me?

A financial advisor can be beneficial to anyone. An advisor can aid in family planning for their children's education, a retiree on a limited budget, a recent widow, anyone dealing with the financial aspects of life-altering occurrences such as a job change or sale of a business, or a person who has inherited a sum of money and doesn't know the tax implications. Working with an advisor allows you more time to spend with your family, gives you peace of mind knowing the planning, analysis, and research is being done by experts in the field, and reduces stress knowing that your financial life is in order and a clear path to reach your goals has been defined.

What type of client base do you serve?

We have a very diverse client base consisting of baby boomers, retirees, divorced individuals, professional athletes, business owners, physicians, and more.

Does Geier Asset Management subject itself to outside oversight?

Yes, an outside CPA firm conducts an annual audit of the books and records of Geier Asset Management, Inc. In addition, the principals and associates have obtained various licenses and are subject to the Code of Ethics of the American Institute of CPA's, Certified Financial Planner® Board of Standards, National Association of Securities Dealers, as well as various state and federal regulators.

We believe serving our clients is both a privilege and an honor. We place extreme value on the relationships we build, and would love the opportunity to earn your trust. Give us a call and get to know our team.

Geier Asset Management, Inc.
2205 Warwick Way, Suite 200
Marriottsville, MD 21104