



Our Role as Trusted Advisor

At Geier Asset Management, we understand that you work hard to achieve success and that you have dreams for yourself, your family, and perhaps your business. At Geier, we can help you grow and protect what you have achieved, and help make your dreams a reality.

A Plan as Unique as You Are

You need a financial plan that works for you now, and more importantly, has the flexibility to grow and evolve as your life changes. We'll start by listening to your goals, concerns, and aspirations.

Maybe you are thinking about saving for a secure retirement, funding your children's college education, or providing a retirement plan for your employees. Whatever your financial goal is, we can develop a plan that works for you.



How We Can Help

Our experienced team will start the process by taking a comprehensive look at your financial picture. After understanding your needs, we can develop a financial plan that will help you protect and grow what you have, while preparing you and your family for the future. As your life changes, your needs, goals, and financial situation may change too. As a result, the plan we create together must be flexible. It will evolve just as you do, as will the strategies we employ to ensure your plan always meets your needs.

We Can Help You

- Secure a comfortable retirement
- Meet future college expenses
- Implement an effective estate plan
- Design a budget/cash flow management strategy
- Craft, implement, and manage a customized investment strategy
- Develop a charitable giving plan
- Manage your taxes
- Determine appropriate insurance coverage

Investment Management For All Your Goals

We offer a comprehensive range of investment strategies to help you meet your goals. Our investment management solutions include high-quality mutual funds, as well as custom portfolios tailored specifically to your needs and preferences.



Our Investment Management Committee uses a rigorous and disciplined investment process consisting of qualitative and quantitative measures to select the most appropriate investments for our clients' portfolios.

Retirement Plan Solutions

For business owners, we can offer comprehensive retirement plan solutions, including 401(k) and profit sharing plans. Geier Asset Management provides the investment management for these retirement plans and our trusted recordkeeping partner, provides state-of-the-art recordkeeping and plan administration.

Insurance To Protect Your Family

We can make recommendations regarding the amount of life insurance you need based on your unique situation. We understand that a family with young children will have different insurance needs than empty-nesters nearing retirement. Our team can evaluate your situation and recommend insurance coverage that makes sense for you.



Estate Planning And Asset Protection

Our team can review your current assets, and talk with you about your priorities and wishes. We can then propose specific strategies and work with your attorney to implement the appropriate plan. No one should have to worry about what the future will bring where their family is concerned. Having an effective estate plan in place can help alleviate that worry and preserve and protect assets for your family's future.

Excellent Service Matters

Our focus is on providing exceptional service and building long-term relationships with the clients we serve. We have been consistently named by *Worth* magazine, *Baltimore Business Journal*, *Financial Advisor* magazine and others as being among the best financial advisors in the area.

We strive to bring this level of excellence to each client that we serve.

Providing Practical Solutions To Individuals And Businesses

At Geier Asset Management, our highly credentialed team of Certified Financial Planners, Certified Public Accountants, Personal Financial Specialists, and Analysts can provide you with practical solutions to a wide variety of financial issues.

We can help you pursue your financial goals with confidence, using a distinctive combination of expert guidance, comprehensive solutions and the comfort of a rigorously-tested investment process.

About Geier Asset Management

Founded in 1999, Geier Asset Management is an investment advisory firm that provides financial planning and investment management services to high net-worth individuals and business owners.

Our goal is to grow, protect, and conserve wealth for our clients while delivering an unprecedented level of personalized service and expertise.

Let's Talk. We would consider it a privilege to help you.



Meet some of our Team

Left to right: Greg Palacorolla, CFP®, Joe Geier, CPA, Dan Mules, CPA, Tom Geier, CFP®, CPA, PFS, Brian Woods, Erich Imphong, CFP®



GEIER ASSET

Geier Asset Management, Inc.

"Our ability to develop deep relationships with our clients and a clear understanding of their needs, goals, and risk tolerance, has helped us to serve our clients well over the years"

Joseph N. Geier, President
Geier Asset Management, Inc.