

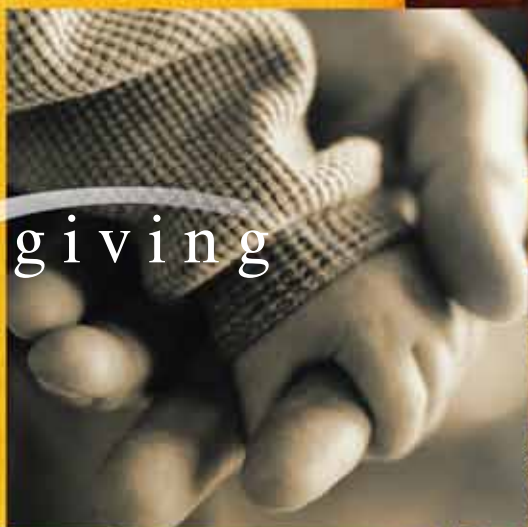
You've *made* it.
Now *what* are you going to *do* with it?



family



fun



giving



goals



What do you want your *money* to accomplish?

Life *experiences* shape who you are and how you make decisions.

Life *changes* create new challenges and new experiences. At Gilbert & Cook, we **understand** how these experiences can impact your overall financial security. Whether it is a life-transition or a **goal** related to buying a vacation home, traveling, or fulfilling a life-long passion, we at Gilbert & Cook are here to help.

A good *problem* to have.

Money can be intimidating. Some **people** may find it easier to make money and build wealth than to manage money. That's where we can share expertise and experience. We help affluent clients *protect* the assets they have worked hard to achieve, while developing *growth* and *income* strategies to match their lifelong goals.

Experience *Tradition*

The Gilbert & Cook **team** has a special mix of experience, knowledge and personal *integrity* to help form a successful relationship. Our client/advisor partnerships are long-term and are built from referrals demonstrating the highest-level of *trust* and comfort our clients place on us.

Experienced Advisors

While Gilbert & Cook uses a team approach to help you reach your financial goals, the company is lead by the experience and caring direction of Marlis Gilbert (left) and Linda Lundstrom Cook (right). Their credentials include Certified Financial Planner designations, a Masters of Science in financial planning, and specialized training as a Certified Divorce Financial Analyst (CDFA).





By choosing **Gilbert & Cook**, you will experience:

- An effective *team* genuinely concerned about your financial welfare and goals.
- Effective *listeners* who will take time to know you and understand your financial perspectives.
- An effective action from *advisors* who will bring you a well thought out financial plan for long-term prosperity.

Experience *Security*

Gilbert & Cook's exclusive Financial Security Method helps create and preserve high-net worth wealth. This six-step approach clarifies your **goals**, sets realistic *expectations* and completes your financial action plan. Additionally, a disciplined asset-management strategy is **tailored** to fit your unique situation using the most advanced technology and market research. We continually monitor your plan in lieu of your future life changes.

The Reality Check is the first and last step in our method. It captures information about your current financial situation and makes sure you stay on the right course.

The Design Meeting allows you to communicate your hopes and dreams as it relates to your financial security.

The Prosperity Plan is a personalized blueprint designed to achieve your financial goals for the short-term and long-term.

The Money Matrix maps your financial needs over different time periods to make capital available when you need it.

The Investment Strategy analyzes the vast array of investment vehicles available and defines your investment strategy to help achieve your goals.

The Results Manager tracks your portfolio and identifies when adjustments need to be made in your investment strategy.

The
**Design
Meeting**

The
**Reality
Check**


The
**Prosperity
Plan**

The
**Financial.
Security
Method**

The
**Results
Manager**

The
**Money
Matrix**

The
**Investment
Strategy**



Experience you *deserve.*

Experience *Confidence*

At Gilbert & Cook, we are confident our expertise will help create value and financial security for our clients. What are you waiting for? Call today and make an appointment.

Personal Financial Review	Fee Based Asset Management
Portfolio Design and Review	Business Consulting
Traditional Investments	Estate Preservation
Fee Based Financial Planning	Risk Management
Education Planning	Divorce Financial Planning
Tax and Cash Flow Analysis	Educational Seminars
Retirement Projections	



Caring for your Financial Security

2670 - 106th Street
Suite 220
Des Moines, Iowa 50322
(515) 270-6444 • Fax (515) 270-6446

www.GilbertCook.com

Securities offered through VSR Financial Services Inc., a Registered Investment Advisor and, Member NASD/SIPC.
Gilbert & Cook Inc. is independent of VSR.