



# INVESTMENT ADVISORY SERVICE

Does your financial plan cover more than just investments? If not, then continue reading.

## Top 150 Firms in the Nation\*

Of all the Investment Advisory Firms who are also CPA firms nationally, Griffiths, Dreher & Evans, PS, CPAs is **Top 150** for the past five years in a row, as reported by Accounting Today publication.



## Nobel Prize Winning Investment Philosophy Solution

Guided by an Award Winning Philosophy, our **Three Pillars Investment Program** provides a secure and stable foundation for your Investment Portfolio - while supported by experienced Investment Advisory Representatives, a detailed Client Services Team, and a well-respected Custodian.



## Discovery Meeting to Determine 'Fit' or 'No Fit'

Our Investment Advisory Program offers complimentary **Discovery Meetings** to help you share your story, goals, and priorities - and just as importantly, find out if we are a good fit for one another.



## Personal Visual Financial Plan

A retirement plan is more than an investment portfolio. That's why our proprietary **Big Sheets** give you an easy-to-understand, big picture perspective, covering all aspects of your financial situation, from taxation to estate planning to wealth protection. Our recommendations focus on your goals and prioritize what's important to you.

## Secure and Insured

Griffiths, Dreher & Evans, PS, CPAs has **Charles Schwab & Co.**, as primary custodian for our clients' accounts.



\* Annual ranking of CPA firms by assets under management by AccountingToday.com in 2020, 2021, 2022, 2023, 2024. Data is provided by AuditAnalytics.com. This ranking is not an indication or guarantee of the future performance of GDE; and a client's actual experience with GDE may not be the same as the Accountingtoday.com ranking of GDE.

Learn more about achieving your retirement goals.  
Schedule a **Discovery Meeting** today!

