Prudent Wealthcare™

Gage DeYoung, CFP®

# Our commitment to you

We are dedicated to helping you achieve your investment goals by providing personal attention and quality services.

## How we help you succeed

We provide financial planning, cost-efficient portfolio construction, and ongoing discussions to earn your confidence and help you achieve your goals.

**Understand your goals** → **Gather information about your situation** → **Evaluate your situation** → **Discuss options** → **Create and implement your plan** → **Monitor your plan** → **Discuss updates and observations**

Reach your goals | Maintain confidence | Balance risks, rewards

## Our services

We offer a range of planning resources and services to help you reach your goals:

- Financial planning
- Investment strategies
- Insurance solutions
- Periodic reviews
- Retirement planning
- Income distribution
- Estate planning
- Coordination with other professionals

## How we communicate with you

Scheduled outreach includes regular planning reviews, check-ins, and ongoing education opportunities. You can also count on a response within 24 hours whenever you contact us with a question or concern.

## Our fee structure

Our investment advisory practice is fee based utilizing a fixed annual fee structure. The table below reflects what our fees typically look like.

| SERVICES | AMOUNT |
|---|---|
| Initial fee though December 31st of current year | $4500 Couple / $3000 Individual |
| Annual ongoing fee for proceeding calendar years | $3000 Couple / $2000 Individual |

* Additional charges may apply based on planning needs. Consult your advisor for fee arrangement specific to your circumstances.

## Office history

*Prudent Wealthcare LLC was founded in 2015 out of a culmination of information and professional experience gathered over the previous 25 years. We operate as an independent financial advisor and proudly extend a fiduciary duty of care to our clients.*

## Founder


**Gage DeYoung, CFP®**

*gage@prudentwealthcare.com*
*(720) 598-8978*


Gage has over 25 years of professional experience. His areas of expertise are efficient wealth accumulation and retirement transition. He collaborated with hundreds of affluent families in the South Denver area from 2001-2014. Gage's articles have been published by Investopedia, Business Insider and Yahoo Finance. He has also been quoted in articles appearing in U.S. News & World Report, The Fiscal Times, Investopedia, and Bankrate.

## Disclosures

Advisory services are offered through Prudent Wealthcare LLC; an investment advisor firm domiciled in the State of Colorado. This document shall not be directly or indirectly interpreted as a solicitation of investment advisory services to persons of another jurisdiction unless otherwise permitted by statute.

Follow-up or individualized responses to consumers in a particular state by our firm in the rendering of personalized investment advice for compensation shall not be made without our first complying with jurisdiction requirements or pursuant an applicable state exemption.

For information concerning the status or disciplinary history of a broker-dealer, investment advisor, or their representatives, a consumer should contact their state securities administrator.