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## Realistic Retirement Plans That Are Built to Last

*Linden Thomas and Company*



Most financial advisors would agree: when it comes to meeting long-term retirement goals, informed planning, open communication, and sound execution are equally critical. But those select few who actually emphasize all three *in practice*—identifying clients' goals, managing their expectations, and building tailored portfolios designed to achieve realistic ends—are truly a cut above.

Consider the Charlotte-based investment consulting firm Linden Thomas and Company, whose refreshingly direct, comprehensive approach to retirement planning has fueled its rise to the top tier of its industry. In 2011, with over \$800 million in assets under management, Linden Thomas and Company ranked #7 among America's Top 100 Independent Broker/Dealer Advisors\* 2012 (*Registered Rep.* magazine).

### Thoughtful Approach to Growth and Net Income Needs

Serving clients with assets exceeding \$1 million, Linden Thomas and Company takes a very measured approach to



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\*Rankings were based on assets under management for independent broker/dealer reps only.

Investment products and services are offered through Wells Fargo Advisors Financial Network, LLC (WFAFN), member SIPC. Linden Thomas and Company is a separate entity from WFAFN.

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building investment portfolios. The firm begins with a lengthy information-gathering process to gauge clients' current circumstances and projected retirement needs. Its 17-member professional team helps clients set realistic goals and allocates resources to seek desired growth with the least possible risk. Rather than relying on high-cost investments with insufficient yield, the team takes great care to select the most suitable investment vehicles for each plan. And it delivers all of this in straightforward terms.

"As independent advisors who share our clients' interests, we work to build unity with them in a consultative way," explains Managing Principal Steve Thomas. "Our responsibility is to educate them about risk, income needs, cash flow, and how it all ties together; their responsibility is to make sure they stay on course."

### Firm's Success Reflects Team Commitment

Thomas attributes the firm's continuing success to its cohesive team of financial advisors, whom he describes as dedicated, service-oriented professionals with more than 200 years' collective experience in the industry.

"I came from a large-firm environment, where even the most senior advisors might have a small staff of four or five," Thomas says. "In contrast, we're a team of 17 professionals operating as a single, collaborative entity, bringing the totality of our experience and commitment to bear. This allows us to serve our clients in a very high-level, high-touch way."