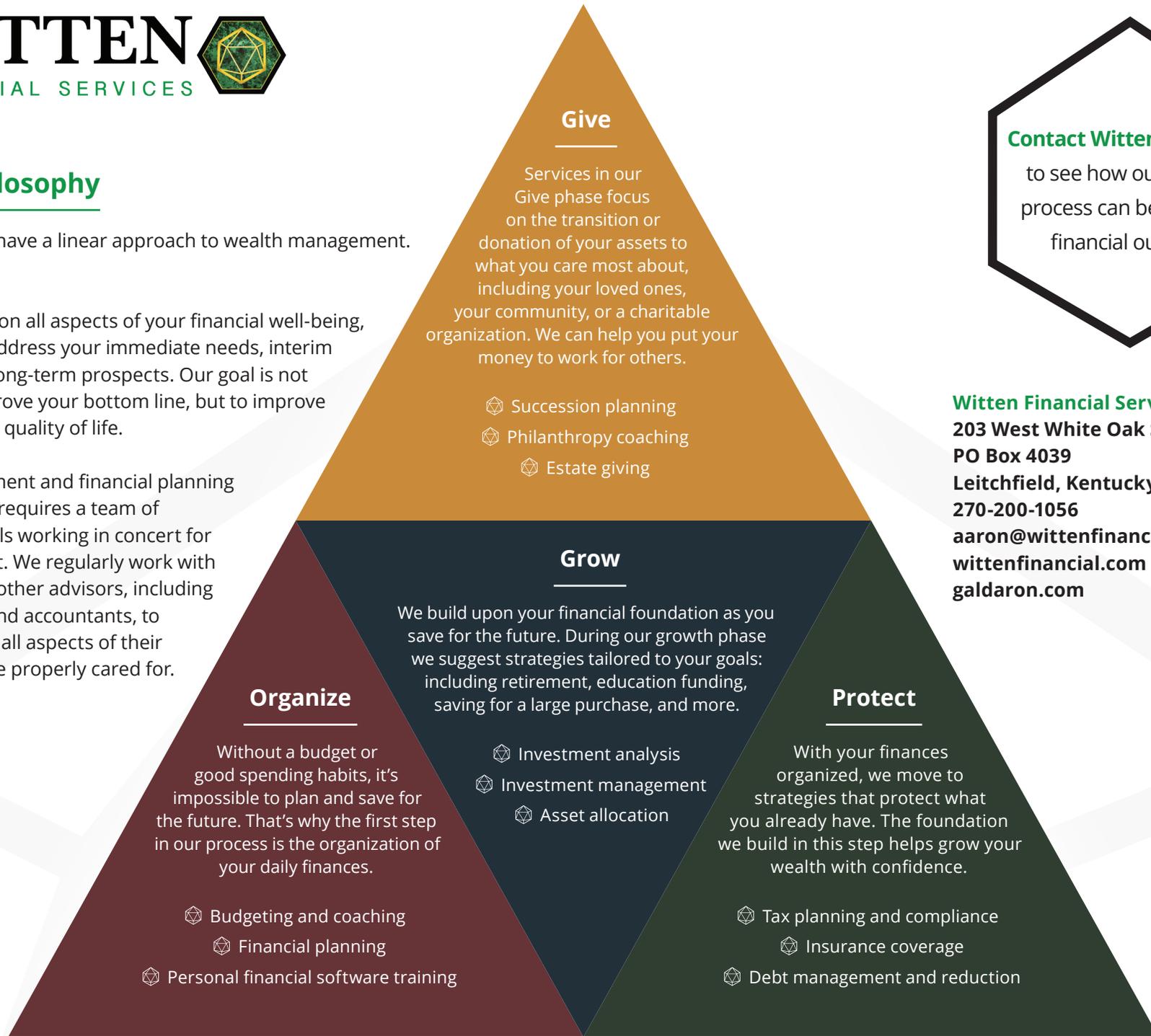


## Our Philosophy

Most firms have a linear approach to wealth management. We do not.

By working on all aspects of your financial well-being, we aim to address your immediate needs, interim goals, and long-term prospects. Our goal is not only to improve your bottom line, but to improve your overall quality of life.

This investment and financial planning philosophy requires a team of professionals working in concert for your benefit. We regularly work with our clients' other advisors, including attorneys and accountants, to ensure that all aspects of their situation are properly cared for.



### Give

Services in our Give phase focus on the transition or donation of your assets to what you care most about, including your loved ones, your community, or a charitable organization. We can help you put your money to work for others.

-  Succession planning
-  Philanthropy coaching
-  Estate giving

### Grow

We build upon your financial foundation as you save for the future. During our growth phase we suggest strategies tailored to your goals: including retirement, education funding, saving for a large purchase, and more.

-  Investment analysis
-  Investment management
-  Asset allocation

### Protect

With your finances organized, we move to strategies that protect what you already have. The foundation we build in this step helps grow your wealth with confidence.

-  Tax planning and compliance
-  Insurance coverage
-  Debt management and reduction

### Organize

Without a budget or good spending habits, it's impossible to plan and save for the future. That's why the first step in our process is the organization of your daily finances.

-  Budgeting and coaching
-  Financial planning
-  Personal financial software training

### Contact Witten Financial

to see how our unique process can better your financial outlook.

**Witten Financial Services, LLC**  
 203 West White Oak Street  
 PO Box 4039  
 Leitchfield, Kentucky 42755-4039  
 270-200-1056  
 aaron@wittenfinancial.com  
 wittenfinancial.com  
 galdaron.com