



Investment
Guidance

Banach Wealth Management

Joseph Banach
Littleton, CO 80161-3432

Phone (720) 493-8707
Fax (720) 493-8707

<http://www.banachwealthmanagement.com>
E-mail jabanach@gmail.com

Form ADV Part II Adviser Regulatory Disclosures

- Adviser Education
- Background
- Fees, Account Sizes
- BWM Strategies

Available on website Services page link

Please contact us to serve you

Banach Wealth Management



“Life includes changing opportunities and risks. We look for long term wealth enhancing opportunities and manage risks through uncertain waters to meet client wealth distribution goals.” - Joseph Banach

Registered Investment Advisor



Investment
Guidance

Banach Wealth Management Investment Advisory Services

Client Education through our website <http://www.banachwealthmanagement.com> includes the following investment guidance topic categories.

- Investor behaviors and risk management
- Portfolio Management and Investment Strategies
- Market Commentaries - a basis for portfolio adjustments

Weekly website letters discuss these topics to support communication and meet client long-term investment goals.

BWM provides two Investment Advisory Services

1. Company Savings Plan Guidance

Employee savings plan evaluations and presentations

- Investment education & plan choice reviews
 - 401K, 403B, & Profit Sharing plans
- Employee presentations
 - overview investment principles, goals and risks
 - plan choices and company information website review
 - example portfolios explanation

2. Family, Individual & Trust

Advisory Service

- Services tailored to stated goals, objectives, and constraints
- Conservative and moderately aggressive strategies
- Investment Advisory Agreement (IAA) form available
- Quarterly portfolio statements
- Adviser directs client to make portfolio changes.
- No adviser fund custody, no broker or plan affiliations.

An Independent Advisory Service