Advisor Advantage

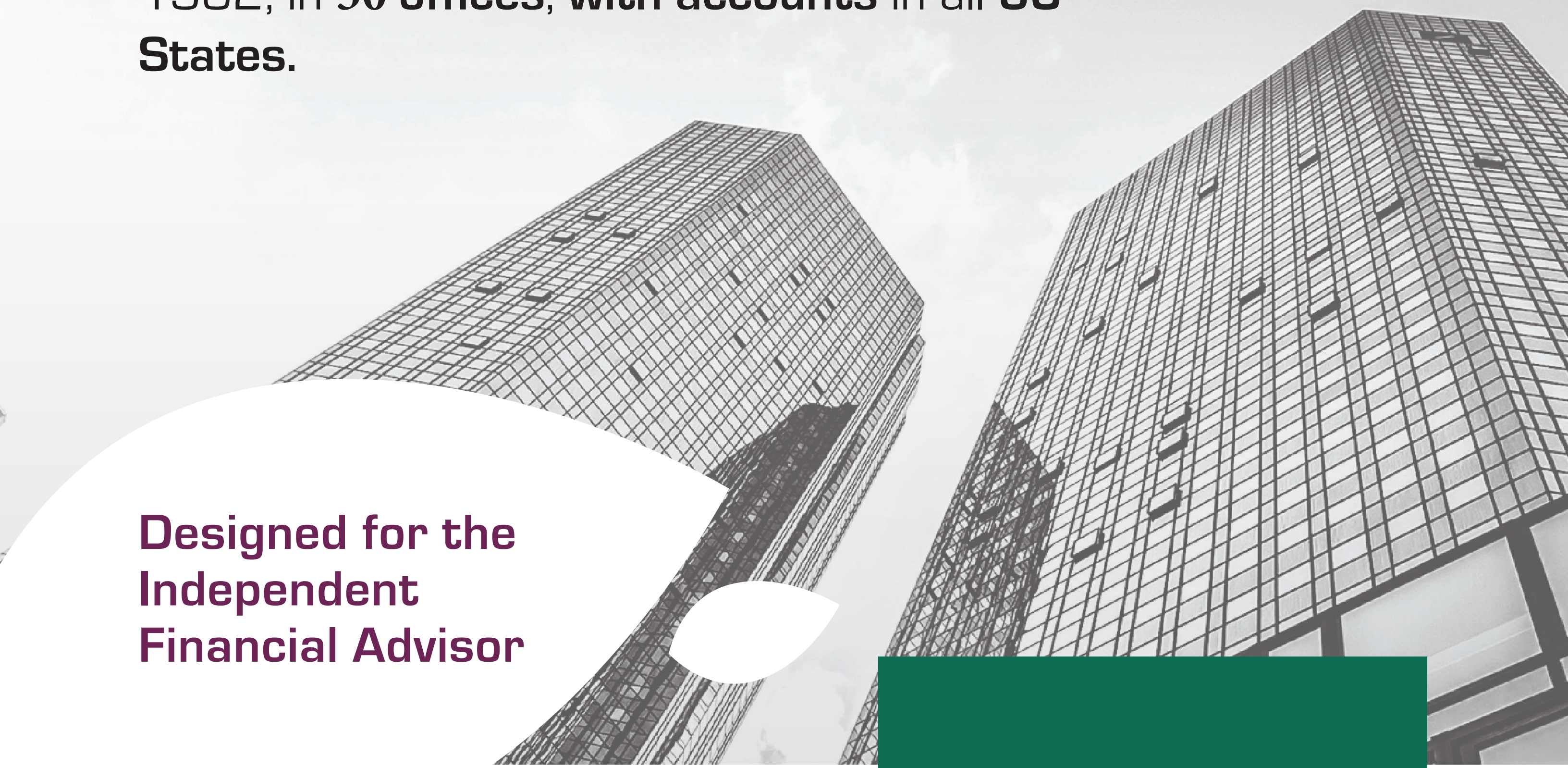
G.A. REPPLE
INVEST WHERE IT MATTERS

We exist to serve you since 1982

Technology • Marketing • Training • Operations • Compliance

Wealth Management Advantage

Bringing more services to your clients since 1982, in **30 offices**, **with accounts** in all **50 States.**



Designed for the Independent Financial Advisor

Bringing a Broad Range of Financial Services

- Investment Advisor Platform
- Broker Dealer Platform
- Life and Annuity Insurance Platform
- Tax, Estate and Financial Planning Platform
- Planned Giving Platform
- Compliance Support
- Operations and Business Development
- Technology and Marketing Services (Brand your own company)
- Biblically Responsible Strategies
- Alternatives

Seek first the kingdom of God and His righteousness, and all these things shall be added to you.

Matthew 6:33 NKJV

We make doing business easy

Equipping Financial Advisors to fulfill **God's Plan** for their lives through business.

Strengths

- A Leader in Helping Financial Advisors Grow Kingdom Companies
- Intentionally Building a Biblically Responsible Platform
- A Leader in Biblically Responsible Investment Assets Under Management
- A Leader in Raising Money for Charitable and Kingdom Causes
- A Leader in Teaching Biblical Entrepreneurship and Stewardship
- A Leader in Bringing Biblically Responsible Investment to Non-Profits and Kingdom Businesses

Case Design

- Charitable Estate Planning
- Asset Allocation
- Estate Design
- Insurance Case Design

Technology

- Online Trading Platform for Stocks, Bonds and CDs
- Bond Beacon
- Paperless Scanning of Back Office
- Riskalyze
- Docupace
- DocuSign
- Fee-Based Tools
- eVALUEator
- Albridge
- E-money
- Social Media

Other Benefits

- Debt Free with 37 Years of Experience
- Broad Product Offering
- Solution-Oriented Approach to Compliance
- Charitable Trust Administration
- Leaders are Experienced in Charitable Case Design, Tax Preparation, Investment Management and Financial Planning

Training

- Biblical Stewardship Training
- G. A. Repple Planned Giving Consultants Certificate
- Biblical Entrepreneurship Training
- Strategic Business Planning
- Referral Training, MoneyTrax and Infinite Banking
- Business Plan Support
- Coaching Support

G.A. Repple & Company
Who We Are

Our Purpose
Equipping Financial Advisors to fulfill God's plan for their lives through business by building Kingdom companies.

Vision
It is our vision to see Financial Advisors transforming families, businesses and communities across the country through Workplace Ministry by bringing a Biblical Worldview to Financial and Estate Planning.

We envision G.A. Repple as a national leader in providing Charitable Planning services and Biblically Responsible Investing to clients of Advisors.

Statement of Belief

We believe...

- † the Wisdom of God is greater than the knowledge of man.
- † that the wealth of this world is uncertain.
- † that the wealth of this world is temporary.
- † that the Purpose of Wealth is to further the Kingdom of God which is to bring redemption to ALL through Jesus Christ from the darkness of this world into Righteousness.
- † that Prosperity is first Spiritual which is seeking First the Kingdom of God and HIS RIGHTEOUSNESS.
- † that our work is worship (Avodah). That our work is redemptive and purposeful in serving others.
- † that Freedom, Liberty and Justice can only be found in Christ Jesus, not in wealth or anything else.
- † that God in Christ Jesus has provided for all that we will ever need. Our HOPE and TRUST is in the Lord, not in our wealth.
- † that God's perfect Love gets rid of the fear of lack and the poverty mindset.
- † that we are stewards and not owners of all that God has given us to manage for HIS PURPOSE.
- † that God's Agape Love is demonstrated through a Generous Life. God so loved that HE GAVE.
- † that God's purpose and plan is for us to be in Relationship with HIM. HE made us RIGHTEOUS through the shed blood of Jesus.

Why

We want to be the standard in the Financial Services industry representing Kingdom focused Financial Advisors to build their business, serve their clients, and impact their communities.

What We Do

We can help you with the following:

- We support Independent Advisors who want to build ensemble practices and large OSJ Branches.
- Estate planning for your clients, wills, trusts, power of attorney, health care powers, creditor protection, sub-trust and more.
- Asset management – discretionary advisor managed, third party managed, artificial intelligence, broad and not limited.
- Biblically Responsible Asset Management with third party managers, mutual funds, ETF and artificial intelligence.
- Technology to make processing business more seamless, simple and efficient.
- Marketing to gain new clients, seminars, website, social media and advertising campaigns.
- Back Office Support

- Answer to key questions on how to finance cars and equipment, pay for college education, pay off debt and still have assets, 15 yr. versus 30 yr. mortgage, Roth IRA versus IRA, term insurance versus cash value, solving for sequence of returns, maximum wealth to children and charity, reducing tax, when to take social security, maintain uninterrupted compound interest, increase tax efficiency, increase secured income versus variable income, increase diversification to reduce risk and increase return, safety buffers to portfolio building and more.
- Planned Giving tools and training for gift annuities, donor advised accounts, charitable trusts, commitment giving trusts, life estates all to increase gifts to Heirs and Charity.
- Biblical world-view toward life, wealth, service, stewardship, generosity, estate planning and debt.
- Established service-driven compliance and operations support to help grow your business.
- Due Diligence on Alternatives in private equity, energy and more.
- Education, training and development of your business to serve more people and offer more services to maximize the value of your business.
- Practice development, coaching, software for financial planning, estate planning, tax planning to answer the client's questions and more.
- Established Home Office with Financial Advisors to assist you.


Tax Efficiency
Reduce Risk
Wealth to Heirs
Income
Philanthropy
Needs
Trusted Advisor
Tax Planning
Risk Management
Money Management
Estate Planning
Financial Planning

Wealth Management Advantage

Bringing Solutions to Your Clients

Strategies to:

- Increase Income
- Reduce Tax
- Increase Secured Income
- Increase Wealth to Heirs
- Increase Wealth to Further the Kingdom of God

Planning Solutions

- Educational Planning
- Retirement Planning
- Special Needs Planning
- Asset Protection Planning
- Exercise of Stock Option Planning
- Exit Strategy for Retirement Account Planning
- Estate Planning
- Tax Reduction Planning for Selling Real Estate, Stock or a Business
- Reduce Tax, Administrative Expense, Time in Estate Settlement Planning
- Zero Estate Tax Planning
- Business Succession, Buy Out and Deferred Compensation Planning
- Potentially Pass 100% of Estate to Heirs and Another 100% to Charity
- Removing the Moral Darkness from Investment Portfolio Planning

G.A. Repple & Company

Asset Management

Single Source for Account Management

- Risk Profile
- Artificial Intelligence
- Construct Portfolio's
- Conduct Research
- Opening Account Documents
- Manage the Account, Rebalance
- Block Trade
- Build Models
- Performance Reporting

Advisor as Manager

(26) Mutual Fund Strategies and ETF Strategies

(278) Separate Account Managers

Unified Accounts

Robo Advisory

Gsphere Artificial Intelligence Software

Services Advantage

Wealth Management Services

- Financial Plan
- Financial Tolerance Testing
- Increase Secure Income Review
- Moral Assessment
- Increase Diversification Optimization Review

Estate Planning, Tax Planning and Charitable Planning

- Review Wills, Trusts and Current Estate Plan
- Increase Wealth to Heirs and Charity
- Reduce Taxes, Expenses and Delays in Distribution of Wealth to Heirs and Charity

Tax Planning and Preparation, Estate Administration

- 1040 Tax Preparation, 1041 Estate and Trust Administration
- 5227 and 1041 Tax Return Filings for Charitable Trust and Lead Trusts
- Tax Strategies
- Selling a Business, Real Estate, Exercise of Stock Options, Tax Reduction Plan

G.A. REPPLE

INVEST WHERE IT MATTERS

Because our
FAITH matters

Because our
FAMILY matters

Because our
FINANCES matters

Because our
FREEDOM matters

Because our
PHILANTHROPY matters

We are a Resource to the Independent Financial Advisor

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