

BUILD A LEGACY

A TRADITION OF IMPACTING FAMILY BUSINESS

Assured Equity is a family-owned, Denver-based financial services firm founded in 1989. We work with clients nationally and are dedicated to guiding other family-owned and privately held companies toward multi-generational financial independence. In other words, we understand the privately held business and the families that run them. We know how much work it takes to be successful and we understand your often complex problems dealing with taxes, executive and employee benefits, estate planning, and business transitioning. In our family-owned company, we have dealt with many of these issues ourselves.

OUR FAMILY OF COMPANIES

WE TAILOR OUR SERVICES FOR YOU

We are a group of dedicated professionals devoted to customer service and meeting your unique needs. We strive to exceed your expectations, paying attention to your concerns and tailoring strategies to your business and financial goals.

AEM Partners (dba Assured Equity) is a financial and insurance firm.

Assured Equity Management Corp. designs and implements competitive employee group benefit plans.

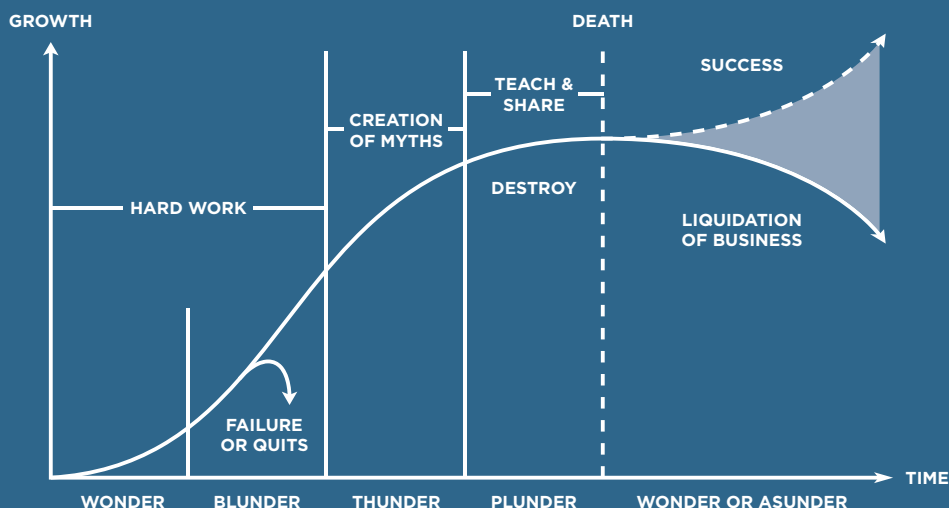
AEM Properties is a family real estate holding company.

Donohue Feiman Retirement Plan Services designs and administers comprehensive retirement plans.

GROWTH STAGES OF A BUSINESS

YOU ARE EITHER GROWING OR DYING

Every business encounters these stages at different times and under different circumstances. Our goal is to help you through these stages so you can leave the business legacy you want.



Reprinted with the permission of Predictable Futures Inc. from Chapter 3 of Leon Danco's book, "Beyond Survival."



CONTACT US

1800 Glenarm Place, Suite 900
Denver, Colorado 80202
303 | 892-5701

We are a group of dedicated professionals devoted to customer service and helping you meet your unique needs.

Securities and Investment Advisory Services offered through M Holdings Securities, Inc. A registered Broker/Dealer and Investment Advisor, Member FINRA/SIPC. Assured Equity and AEM Partners, LLC. are independently owned and operated. 5409710.1

ASSURED EQUITY

WE ARE HERE TO HELP YOU IMAGINE, DEFINE AND ACHIEVE YOUR FAMILY AND BUSINESS LEGACY

Querencia is a term coming from the Spanish verb “querer,” which means “to desire.” This is the place where you are your most authentic self. A place from where strength of character is drawn; where you feel most at home and know exactly who you are. We draw strength from our business and family, maybe you do too?



PASSING THE BATON

BUSINESS TRANSITION PLANNING

When you own your business there is much more to retirement than packing up your office. Do you pass the business on to someone in the family? Do you transition or sell it to one or more key employees? Or do you sell it to someone on the outside? Our focus is to work with you to develop a customized strategy that meets your unique business and family needs in transitioning the business.



BENEFITS PACKAGING

GROUP, RETIREMENT & EXECUTIVE BENEFITS

Your employees are an integral part of your company's success. We work with you to customize a strategy to help attract, reward and retain a strong workforce. Our goal is to provide a customized solution. It begins with design and budget and then communicating the strength of your plan to employees all while being mindful of the plan's compliance requirements.



BUSINESS TUNNEL VISION

FINANCIAL & ESTATE PLANNING

Running a business requires significant time, energy, and focus. We help you uncover your financial, estate and charitable goals. We develop a strategy that incorporates your business and helps you execute on that plan on an ongoing basis. Coordinating your business and personal planning goals allows you to keep your focus where it is most needed.



HOLISTIC PLANNING

THE SMALL PIECES MAKE THE BIG PICTURE

There are times when business owners focus their attention on one component. Other times, business owners decide a more comprehensive approach is needed. Focusing on the whole picture at once allows your impact to flow through to all facets of your life. By facilitating an integrated planning process, we help you realize the legacy you envision for your business and family.