Asset Preservation Strategies, Inc.
Collaborative Wealth Management

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FAVORITE QUOTE

"Live in the moment."

AREAS OF EXPERTISE

- Business Succession Planning
- Asset Protection Strategies
- Tax Reduction Strategies
- Real Estate & Alternative Investments
- Retirement Planning
- Insurance & Estate Planning
- Private Asset Management & Planning

EDUCATION & CERTIFICATIONS

- Certified Financial Planner™ (CFP®)
- Chartered Life Underwriter (CLU)
- California Registered Tax Preparer (CRTP)
- Fellow and Laureate in Wealth Strategies; Southern California Institute
- Advance Wealth Strategist Planner Esperti Peterson Institute; Michigan State University
- Bachelor's Degree; Oregon State University

FUN FACTS

- Is a surfer and known to hold board meetings in the ocean
- Shares a love for National Parks with his family and tries to visit 1 or 2 locations each year
- Enjoys photography and getting up early to photograph landscapes

Gregory R. Banner, CFP®, CLU®, CRTP

Vice President

A native of San Diego, Greg has been a financial professional since 1987. Greg holds a Bachelor's Degree in Business Administration from Oregon State University, specializing in Finance and Economics. Greg enjoys teaching financial, tax, and business planning locally and nationally on a regular basis. He believes strongly in the benefits of a collaborative network and is a great resource for both clients and professionals.

In 1993, he joined Asset Preservation Strategies, Inc. as a Financial Planner. In 1998, he completed his Certified Financial Planner® professional studies through the College for Financial Planning in Denver, receiving the right to use the (CFP®) mark of distinction. He also holds a Chartered Life Underwriter (CLU®) designation.

Greg is also an Investment Advisor Representative with Securities America Advisors, Inc. and is licensed as an insurance broker. He holds a California Registered Tax Preparer (CRTP) license and is authorized to provide tax advice and recommend tax planning strategies.

In 2001, Greg completed the Advanced Wealth Strategist Planner Program of the Esperti Peterson Institute at Michigan State University and is endowed as a full Fellow of the Southern California Institute. Greg serves as an experienced resource for the media and has been quoted in many local and national publications including: *San Diego Business Journal, Wealth Manager,* and *Research* magazine.

Greg specializes in working collaboratively with his clients and their advisors, providing comprehensive planning services which include: family office services, business growth strategies, business exit strategies, asset management, retirement planning, tax reduction strategies, insurance and estate planning strategies, and asset protection for both individuals and businesses. He is a member of the Business Enterprise Institute and has 28 years of experience working with business owners to grow their businesses in addition to developing a vision and plan for the future of the family and the business.

In his spare time, Greg enjoys spending time at the beach with his family and participating in many outdoor activities such as surfing, snowboarding, and hiking. He also coaches youth soccer.