

# A Passion to Improve Lives Drives Growth for Milwaukee-Based RIA and Partners

*Global View Capital Management, Ltd.*

Challenging the status quo is not for the faint of heart. But “the way it’s always been done” doesn’t have a chance when tackled by those who are driven by a passion to change people’s lives.

In the financial services sector, traditions and philosophies that predate the Industrial Age are still strongly entrenched. But thought leaders like Dina Fliss, president and co-founder of Global View Capital Management Ltd. (GVCM), have helped break down traditional barriers so the “little guy” can access investment programs previously reserved only for institutional investors.

*Eight Global View Capital Advisors were selected by their peers as Wisconsin Five Star Wealth Managers.*

“Once, only high-net-worth investors had the opportunity to protect themselves against severe losses in a down market by placing their money in actively managed portfolios. Assets in these portfolios can be reallocated when the marketplace changes. Everyone else had one option: ‘buy, hold and hope,’” explains Fliss, who began a quest in 2003 to find an alternative to blindly following Modern Portfolio Theory and riding the Wall Street



*Standing, from left: Steve Sorensen; Robert Du Charme; Randy Derbick; Dale Black; Dina Fliss, President and Chief Investment Strategist GVCM; Dean Fliss, President GVCA; Jim Wawrzyniakowski, Chief Compliance Officer; James Hamer; Phillip Palmer  
Seated: David Morton, Chief Research Analyst and Portfolio Manager; Nathan Larsen, Research Analyst and Portfolio Manager*

roller-coaster. “Now, modern technologies, trading platforms and exchange-traded products have leveled the playing field for individuals with as little as \$1,000 to invest! The average retail investors can benefit from the well-proven science of global tactical asset allocation.”

An SEC-Registered Investment Advisor (RIA) with a history of building model portfolios for its own clients – primarily corporate RIAs and portfolio construction managers in the U.S. and Canada – GVCM has become the preferred partner for like-minded advisors, institutions and plan sponsors who

**GLOBAL VIEW CAPITAL®**



MANAGEMENT | INSURANCE | ADVISORS

are committed to downside protection.

## Helping Independent Advisors Excel

“The power of our investment strategies is particularly attractive to institutions and plan sponsors with fiduciary responsibilities and to independent financial professionals. Independent advisors get the best of both worlds: They enjoy the capacities and support of a larger firm while retaining their own books of business,” says Fliss.

GVCM has robust trading platforms for broker-dealers, RIA/broker-dealer hybrids as well as for fee-only RIAs. A comprehensive suite of best-of-breed services in marketing, back-office functions, technology, training, compliance, business development, and best-of-breed investment and insurance products (life, health, annuities and disability) relieves advisors of operational burdens. They are free to spend more time to meet the needs of their clients and grow their business.

“We’ve built an organization around long-lasting partnerships with the best professionals in the field – 175 advisors, 40 money managers and carefully selected product partners,” adds Fliss. “Together, we share a passion for designing, growing and protecting the personal economies of families from all over the world.”

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