MorganStanley
SmithBarney

Greg Pitcher, CFP®

Second Vice President-Wealth Management
Financial Advisor
Financial Planning Specialist

I seek to strengthen each client relationship over the long term by attaining a deep understanding of what matters most to them.

My Mission

My business is built on a single mission: to focus on helping to manage my clients' wealth and providing advice that they can trust. That way, they can spend their time doing what they truly enjoy.

As an experienced portfolio manager, my goal is to help build portfolios that reflect my clients' objectives, lifestyle expectations, cash flow needs and desires for their family. Yes, I offer my clients a wide-ranging set of investment options. But, more importantly, I bring the experience to help my clients make sense of them all, the discipline to help them navigate challenging markets and the resources that address their financial needs.

My Commitment

My clients are the foundation of my practice. As such, I am committed to making a meaningful difference in their lives by guiding them to make well-informed financial decisions, helping them to attain their goals and striving to transcend their expectations.

My dedication to this commitment encompasses providing a high level of client service, both proactively and responsively. Equally important is my attentiveness to anticipating changes and challenges in my clients' lives and to helping them be prepared to meet those circumstances as they arise. I endeavor to earn my clients' trust, thereby building long-lasting relationships with them and their families.

My Background

I am an Orange County native and graduated from California State University, Fullerton in 1995 with a B.A. in Business Administration. I supplemented that education with numerous courses in economics and financial planning at University of California, Irvine, ultimately earning a Personal Financial Planning certification.

In 2003, my love of the financial markets and wealth planning drove me through the rigorous process of becoming a CERTIFIED FINANCIAL PLANNER™. To stay up to date on all news, legislative activity and industry trends, I am a proud member of the Financial Planning Association. My hard work and dedication has been rewarded by Morgan Stanley Smith Barney, where I have achieved Blue Chip Council Member status and a title of Second Vice-President – Wealth Management.

In my spare time, I really enjoy mountain biking, golfing and spending time with my three boys. I am an active volunteer in my children's activities, ranging from coaching baseball and soccer to reading in their classrooms. My wife, Helen, and I were married in the fall of 2009. She is my most valuable asset.

The Way I Do Business

I typically follow a client-focused process that integrates investment decisions with pressing financial needs and desired aspirations. Specifically, you can count on me to work closely with you in the following manner:

Step 1: Personal Review

Before I issue any recommendations, I conduct an extensive fact-finding mission to identify your objectives, time horizon, attitude toward risk and other circumstances that may play a role in shaping your investment strategy.

Step 2: Asset Allocation and Portfolio Planning

I analyze your input and develop a financial strategy created to help you meet your specific needs in areas such as retirement, education and estate planning, as well as tax-minimization strategies. I then present to you a comprehensive plan that helps to identify appropriate diversification strategies.

Step 3: Plan Implementation

After presenting you with a detailed strategy for your portfolio, I work closely with you to bring the elements to life. Should we decide that outside money managers are appropriate for you, we will rely on our research to select from the hundreds of investment-management firms competing for your business. Or perhaps you'd prefer individual securities; if so, I can help identify specific stocks, bonds and other securities that may be suitable for your portfolio. Whatever approach we decide on, I will help keep your portfolio on track.

Step 4: Ongoing Monitoring and Reporting

As you would expect, I believe that ongoing communication is a vital component of my business. I make every necessary effort to keep abreast of your changing financial needs and provide viable strategies to help you meet them. This means monitoring your portfolio at your request and when you feel that your circumstances have changed, I will try to make certain that your assets are positioned according to your evolving needs. If necessary, I recommend adjustments to your strategy to address any alterations to your objectives.

Diversification does not guarantee a profit or protect against loss.

The Morgan Stanley Smith Barney Advantage

Our approach is simple. We want to know as much as we can about our clients, so we're in the best possible position to help them. And that doesn't mean we just want to know about their finances

True, we have to understand what your assets and liabilities are, and how your portfolio is structured. But the more important information has to do with your goals for yourself and your family, your feelings about where you are and where you hope to be and, of course, your fears, and the things that might prevent you from getting what you want.

Because everyone is different, we tailor our recommendations for each client's unique set of goals and challenges. Maybe you want to retire at 55 and start a new business. Maybe you want to be able to pay both college tuition for your child and nursing home care for your mother. Maybe you're in the middle of a divorce and you want to ensure your children's inheritance doesn't go to the future spouse of your ex.

This in-depth knowledge of you, combined with our in-depth knowledge of planning and investing, will help us create strategies aimed at trying to achieve the things you really want. And we have the freedom—and the good fortune—to implement those strategies using the products, services and skills of Smith Barney and our affiliates at Citi, the world's largest financial services firm.

It's time to throw out your notions of what you can talk about with us. We look forward to the conversation.

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1901 Main St
Penthouse
Irvine, CA 92614

TELEPHONE: 949.955.7547
TOLL-FREE: 800.533.3402
FACSIMILE: 949.833.3542

greg.pitcher@smithbarney.com
http://fa.smithbarney.com/gregpitcher