

## Will Assist You With...

-  CD Alternatives
-  Retirement Planning
-  Estate Planning
-  Account Rebalancing Reviews
-  Client Educational Seminars
-  Tax-Deferred Investments
-  Family Financial Counseling
-  College Education Funding
-  Tax Planning
-  401K Rollovers
-  403B Rollovers
-  457 Rollovers
-  Retirement Plan Rollovers
-  Tax-Deferred Annuities
-  SEP IRA's
-  Roth IRA's
-  SIMPLE IRA's
-  Long-Term Care Insurance
-  Life Insurance
-  Investing for Income

## Meet Gordon Halcomb ...

**Gordon M. Halcomb**  
EA, MBC, CTP  
RIR, RIA, LHA



### Professional Designations

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- Registered investment Representative
- Registered Investment Advisor
- Federal Enrolled Agent
- Life, Health, Annuity Insurance Licenses
- NATIONAL SOCIETY OF TAX PROFESSIONALS
- Certified Tax Professional
- NASD Series 6, 63, 65

### Educational Highlights

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- HAMPTON UNIVERSITY, Hampton, VA  
Bachelor of Science, Accounting 1970
- VIRGINIA COMMONWEALTH UNIVERSITY, Richmond, VA Masters  
Studies in Finance 1973-1975
- GENERAL BUSINESS SERVICES, INC.,  
Germantown, MD  
Master Tax & Business Counselor 1988
- Successful Completion of the Princeton  
Law Review 1998

### Successful Career Includes

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- Convention Speaker
- Investment Broker Chapter Director
- Published Author
- NBC WWBT-12 Tax Expert
- St. Paul's and J. Sergeant Reynolds  
Colleges, Adjunct Professor
- Award winning professional for over 30 years

### Family/Interests

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- Married, grown son, golfing, walking