

# **Terry M. Anderson, CFP®**

## **President**

Terry Anderson entered the financial planning industry in 1981 with an emphasis on honesty and open communication which he continues to maintain in both his business and personal relationships. As principal and founder of Wealth by Design and Management, Terry focuses on helping his clients solve complex and sophisticated business transfer problems; avoid severe erosion of their estates due to estate, capital gains and income taxes; and arrange their investments to meet individualized risk tolerance and accumulation objectives.

With over 28 years of experience in helping solve the unique financial planning problems of his affluent clientele, Terry considers safety of principal and capital appreciation two components important to a successful investment plan. According to him, wealth must be prudently managed and carefully nurtured in order to endure the twin ravages of taxes and inflation.

Terry brings an educational element to his philosophy of servicing clients by offering a variety of seminars. He has plans to begin teaching continuing education courses for certified public accountants and attorneys.

Terry successfully completed the demanding requirements to become a CERTIFIED FINANCIAL PLANNER™ professional through the Certified Financial Planner Board of Standards, Inc. Earning and maintaining the right to use the CFP® mark means that Terry has passed a rigorous certification examination and continues to meet the CFP Board of Standard's specific education, experience and ethical requirements. In addition, he is currently working to fulfill the requirements to become a Chartered Financial Consultant® and Chartered Life Underwriter® through the American College in Bryn Mawr, PA.

A Colorado native and true family man, Terry most enjoys spending time with his family at their home in Franktown, Colorado. He is an avid basketball player and golfer, and active in his Christian faith through his own ministry. Terry is also involved in a number of non-profit organizations and has participated in studies to assist trust departments of non-profit organizations around the country.



### **Areas of Expertise**

- Wealth Management
- Targeted Investment Planning
- Strategic Financial Transactions
- Insurance Planning & Analysis
- Estate & Legacy Planning

### **Education/Certification**

- CERTIFIED FINANCIAL PLANNER™ practitioner (CFP®)
- Union College
- University of Nebraska
- University of Wyoming

### **Affiliations**

- Registered Representative, Securities America, Inc.
- Member, Financial Planning Association
- Parker Adventist Hospital Foundation
- ASI Missions, Inc.
- Polly's Place Foundation

Securities offered through Securities America Inc., Member FINRA/SIPC, Terry Anderson, Registered Representative. Advisory services offered through Securities America Advisors, Inc., Terry Anderson, Investment Advisor Representative. Wealth by Design and Management and Securities America Inc. are unaffiliated.