

Asset Preservation Strategies Celebrates Silver Anniversary

Honored to have served distinguished clientele for 25 years, Asset Preservation Strategies looks to the future

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The start of the New Year ushered in the 25th anniversary of [Asset Preservation Strategies](#). Providing collaborative wealth management for ultra-high net worth individuals,

families and business owners, the firm serves some of the most accomplished, established, and ambitious clients in California and beyond. Leading with a planning first mindset, CEO and Financial Adviser Greg Banner and President and Senior Financial Adviser Monica Szakos guide the firm's philosophy. Focusing on intentional, custom-tailored strategies to address complexities and avoid complacency, the advisory team is able to position clients effectively for tax and estate law changes.

The Silver Anniversary also brought with it the retirement of Founder John Jenkins, who invested 43 years in his career in the wealth management industry. Leading Asset Preservation Strategies into the future following decades of mentoring from John Jenkins, Greg Banner and Monica Szakos are inspired to assist their clientele with achieving the financial impact and abundance they desire. The Asset Preservation Strategies team of experienced financial advisors strives to architect personalized wealth management plans that are curated to achieve the best possible outcome for each client. Together, Greg, Monica, and the collective team feel a profound sense of gratitude for the opportunity to serve their clientele at the highest level.

"My purpose is rooted in serving others. I believe that true fulfillment comes from being able to make a difference, and I have seen firsthand how our services have been able to do that for our clientele. I look forward to the evolution of Asset Preservation Strategies and the growth of our team." -Greg Banner, CEO and Senior Financial Adviser, Asset Preservation Strategies, Inc.

"Empowering our clientele with education and the support of our collaborative partners is essential. I look forward to seeing our clientele achieve new levels of financial fulfillment as we



Collaborative Wealth Management

look forward to the future with bold optimism.” –Monica Szakos, President and Senior Financial Adviser, Asset Preservation Strategies, Inc.

About Asset Preservation Strategies, Inc.:

Asset Preservation Strategies offers collaborative wealth management for affluent individuals and families. For over 30 years, their team of experienced financial advisors has specialized in working closely with affluent individuals and families to create customized client portfolios, incorporating sophisticated tax planning and advanced estate planning strategies, in careful collaboration with each professional that plays a part in handling the client’s finances. As fiduciaries, the team at APS is not only required by law to keep clients’ interests first, but their passion and primary goal is to advance responsible stewardship of assets and achieve the best possible outcome for each client.

Investment Advice is offered through Belpointe Asset Management, LLC, 500 Damonte Ranch Parkway, Building 700, Unit 700, Reno, NV 89521. Additional information about Belpointe Asset Management is available on the SEC’s website at www.adviserinfo.sec.gov. It is important to read our disclosures available at: <https://belpointeasset.com/disclosures>

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