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| Mark Josaitis  Barnwood Capital Management  Starter  4/12/22 | 1. Home 2. Services 3. About Us 4. Mission Statement 5. Mark Josaitis Biography 6. Our Process 7. Contact Page |

**Page 1- Home**

**Focused On Your Financial Future:**

Whether you’re looking to start planning for your retirement or you want to manage your investments, Barnwood Capital Management wants to help you set up a worry-free plan for your financial future. Please feel free to take a look around our website and find out more about how we can assist you in meeting your monetary goals.

**A Client-Centered Approach:**

You can trust that our number one focus is on you. That’s why we offer a client-centered approach to all of our services – in fact, we limit the number of clients we take on to ensure that *you* feel valued. We are proud to offer a variety of tools to keep you focused on what matters most.

i. *Retirement*

It can be unnerving to be unsure about what life holds after you retire. The key is to estimate the amount of money you’ll have for retirement and then make a solid plan that allows you to feel confident in your potential retirement-income sources. Let us help you make that plan!

ii. *Investments*

Your investments are a major factor in developing your financial plan. When you invest, you put your money to work – it does more than just sit in your bank. We can help you manage those investments and how they can be built in order to secure your financial future for you and your family.

iii. *Relationships*

We know that you value a close relationship with your advisor – and developing relationships is one of the most important things that we do at Barnwood. In order to maximize the benefits of your financial plan, we work hard to learn where your priorities lie and how we can assist in exceeding your personal goals. Our relationships are multi-generational and involve direct interactions at least three to four times a year. Why don’t we get to know each other?

**Resources Line Text:**

The path to a secure financial future starts with knowing what to prepare for. Take a look at the free resources we offer and learn more about successful financial planning.

**Request A Complimentary Consultation:**

Fill out our form and we’ll be in touch to talk about how we can help you reach your financial goals.

**Page 2- Services**

**What We Can Do For You:**

Barnwood Capital Management specializes in retirement planning and investment management. Many people underestimate the importance of having a solid financial plan. Without the knowledge of what you are trying to figure out, a problem can be difficult to resolve. Fortunately, problem-solving is our vocation – and our team is prepared to face any financial challenge head-on.

Change can be difficult sometimes, but your future doesn’t have to be. We understand the many challenges of retirement and investing in the modern day, and as a result, we want to take the mystery out of preserving your money through successful, goals-based wealth planning. If you’re contemplating taking that first step, please consider the variety of services that we offer in the list below.

(*CSC Notes:*

Take annuity OFF the list)

**Page 3 - About Us/Our Team**

**Our Primary Purpose:**

At Barnwood Capital Management, our team has been working in financial services since the turn of the century. Our expertise has helped many clients establish a sense of security and confidence in their financial future.

We’re here because we want to help you stress less about your money and focus more on living your best life. We succeed when you succeed, which makes *you* our biggest asset. A strategy that works for another client might not work for you, which is why we are completely committed to limiting our clientele to help you develop your own personalized approach to managing your finances.

We promise to be with you every step of the way and face challenges head-on. Our only measure of success is when you achieve your goals.

**Meet the Team:**

Get rid of “Our Team” subpage and put Mark’s picture and bio in this second section

**Page 4 - Mission Statement**

**We’ll Go The Distance:**

What matters most to us at Barnwood Capital Management is that you feel valued. We want you to feel listened to and understood when you voice your aspirations and concerns about your financial future. Outliving your money or having your retirement affected by inflation are real and valid concerns in the modern climate, so we want to make sure that tranquility is your biggest takeaway when working with us. We’ll navigate through these concerns with you when handling your portfolio so that you can plan without worrying.

**Line Strip Text:**

At Barnwood Capital Management, our goal isn’t to be the biggest – we want to be the best for you.

**Our Process:**

We put together customized portfolios for clients in order for them to meet every one of their individual needs and goals.

**Our History:**

Our history shows that we value our families and our country. We put our clients’ needs first in every consideration we make.

**Page 5 - Mark Josaitis Biography**

Mark Josaitis founded Barnwood Capital Management in 2022 after twenty-two years of working in the finance industry. As a wealth advisor at Barnwood, Mark specializes in financial advising and planning, investment management, and retirement planning. He strives to help clients identify and achieve their personal and financial goals.

Mark attended the American College of Financial Services after attending Oakland University. Before his work at Barnwood, he worked at JP Morgan and Merrill Lynch. He has also obtained his Chartered Financial Consultant® designation.

Mark is a Michigan native and lives in Batavia, Ohio with his wife, Karen, and their cats, Baxter and Laney. In his free time, Mark enjoys treasure hunting at antique shows and flea markets, exercising, and spending time outdoors.

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**Page 6 - Our Process**

**Our Process:**

Barnwood Capital Management is all about personalizing our process. We want to build a relationship with you in order to understand your needs before we even set up any accounts. Our experts will meet with you at least two to three times beforehand so that we can truly understand what your goals are, whether it is currently being addressed, and how we may be able to assist you if there are any shortcomings. Then, we can schedule additional meetings to develop a plan, consider recommendations, and give regular progress updates on the status of your goals.

We’re so looking forward to meeting you. Set up an appointment today and we can start working on your future together.

(*CSC Notes:*

Put “Our Process” on Services page underneath list of services offered)

**Page 7 - Contact Page**

**We’d Love to Hear From You:**

If you’re interested in setting something up with us, please don’t hesitate to reach out – you don’t even have to come to Barnwood Drive. We’re proud to serve our clients both face-to-face and virtually – whatever *you* are more comfortable with. If you aren’t sure where to start, or you have a question about what we can offer you, sent us an inquiry using the form below. We’ll get back to you as soon as it hits our inbox!

(*CSC Notes*:

Make this as a blurb before “Edgewood Office”)