



FOR IMMEDIATE RELEASE

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FOR MORE INFORMATION:

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LOCAL INVESTMENT ADVISOR REPRESENTATIVE, RICHARD LOEK, ATTENDS EXCLUSIVE RETIREMENT INCOME PLANNING WORKSHOP WITH 8th FASTEST GROWING REGISTERED INVESTMENT ADVISOR FIRM IN THE US¹

Campbell, California – June 10,, 2013 – Richard “Rick” Loek completed advanced training with fellow investment advisor representatives. Retirement distribution training at Global Financial-Private Capital’s recent Investment Advisor Academy on June 6-7, 2013 in Chicago, IL. Mr. Rick Loek spent several days with Global Financial-Private Capital’s core advisor team, and drilling deep into the complicated issues regarding income planning and studying how to assist clients with retirement income planning.

Reviewing such topics as Global Investment Performance Standard (GIPS), client wealth management process management, and properly conveying who we are and what we do.

GIPS standards are a rigorous set of investment performance measurement standards adopted in 34 countries and recognized around the world for their unparalleled credibility, integrity, scope, and uniformity, enabling direct comparability of a firm’s track record.

Client wealth management process includes a client charter describing the firm’s mission, responsiveness, privacy & confidentiality, personal account management and transparency of services. As well as the wealth management formula consisting of investment consulting advanced planning and relationship management.

ABOUT RICHARD D. LOEK – Mr. Rick Loek the founder of and an investment advisor representative of Onesta Wealth Management LLC. Mr. Rick Loek is in the business of supporting select families with their desire to thrive with grace and easy both financially and in life. Mr. Loek is a Master Elite member of Ed Slott’s Elite IRA Advisor Group.

ABOUT GLOBAL FINANCIAL PRIVATE CAPITAL, LLC is an independently owned, SEC Registered Investment Advisor (RIA) whose goal is to restore investor trust and confidence in the financial system through the creation of client relationships based on full fiduciary disclosure and transparency of action. Investors deserve a credible alternative source of advice compared to those products offered by the major financial corporations who have been described as “too big to fail.” As an independent organization, Global Financial has the freedom to offer unbiased advice without the potential for conflicts of interest often present within these larger broker dealers.

ABOUT ED SLOTT & COMPANY, LLC: Ed Slott & Company, LLC is the nation’s leading provider of IRA training for financial advisors. Mr. Slott is the author of several books on retirement distribution planning. He is a nationally recognized IRA-distribution expert, a professional speaker, and the creator of several public television specials, including Ed Slott’s Retirement Rescue!

Ed Slott has been quoted in *The New York Times*, *Newsday*, *The Wall Street Journal*, *The Washington Post*, *Money Magazine*, and *Forbes*. He has appeared on NBC, ABC, CBS, CNBC, CNN, FOX, PBS, Public Television, NPR, and Bloomberg TV and radio.

ABOUT ONESTA WEALTH MANAGEMENT, LLC is an independent Registered Investment Adviser firm located in California. Onesta Wealth Management works with a select group of families where the mission is to help provide grace and ease both financially and in life.

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Footnote:

1 – WealthManagement.com

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