



Gill Capital Partners

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Gill Capital Partners – Get to know the Capital Difference

About Gill Capital Partners. Gill Capital Partners is an independent Colorado financial services firm, serving clients since 1983. Gill Capital Partners has three distinct lines of business: Wealth Management for the individual investor; Institutional Services for banks and public entities (including Colorado municipalities); and Corporate Services for entrepreneurs and established businesses. Gill Capital Partners helps you plan, predict, protect, your future one day at a time.

To learn more about the Capital Difference, please contact Gill Capital Partners at 303.296.6260 or www.gillinvest.com. Member: FINRA-SIPC.

What does Gill Capital Partners do? (For complete descriptions, go to: www.gillinvest.com)

For the individual investor, Gill Capital Partners offers:

- Money Management
- Tax Planning & Preparation
- Education Planning
- Retirement Planning
- Estate Planning
- Insurance Planning
- Charitable Giving
- Cash Management

For the institutional client, such as a public entity, bank or Colorado Municipality, Gill Capital Partners offers:

- Fixed Income Management
- Custody Services
- Reporting

For the business owner, Gill Capital Partners offers:

- ESOP Advantage™
- Tax Planning & Preparation
- Deferred Compensation
- Retirement Plans
- Accounting Services.

What makes Gill Capital Partners different?

There are many financial services firms in Denver, serving Colorado. However, Gill Capital Partners stands apart from the masses. Gill Capital Partners defines the Capital Difference as:

1. Leveraging decades of real-world experience.

With nearly 30 years in business, Gill Capital Partners has been through tumultuous and calm market cycles. And every time, Gill Capital Partners and their clients successfully weather the storm.

2. Providing clients with real, candid answers.

When it comes to cultivating long-term business relationships with our financial partners, Gill Capital Partners believes honesty is always a good policy. They even have a name for it – Capital Speak. Gill Capital Partners declares client trust as the first order of business. Gill Capital Partners is only as good as each client's word.

3. Delivering success, based on a proven track record.

Gill Capital Partners is a team of seasoned experts with a collective range of high-level business experience in the financial world. Moreover, Gill Capital Partner's dedicated advisors take the time to provide one-on-one assistance. Client relations are the top priority – it's why Gill Capital Partners' client base comes almost exclusively through referrals.

4. Producing results.

Achieving financial goals in the real world takes a combination of knowledge, dedication, hard work, and most importantly, follow-up. Gill Capital Partners utilizes an advanced research methodology that blends fundamental and technical analysis. The result is always a fine-tuned, well researched plan to take clients from point A to point B.

5. Retaining clients.

Gill Capital Partners is committed clients. The firm works towards one goal - client success. Whether the client is a large corporation looking for informed answers and atypical opportunities for growth, or a private individual wanting to achieve a financial dream, Gill Capital Partners delivers the same personalized service.

Principal Q&A

James O'Brien, CFP®, Managing Partner

John Winslow, Managing Partner

Q: Why did you want to start your own financial services business?

O'Brien A: I wanted to create a firm where clients would feel confident that we put their interests first. A firm where clients would come to expect a very high-level of personal service while receiving unbiased, tailored financial advice. A firm that would help clients reach their financial goals, and in the process have an exceptional experience.

Winslow A: The world of financial services is filled with complexities. I wanted to create a firm that would provide transparency, objectivity and education to all investors. I wanted to be able to sit on the same side of the table as my clients and have clear objectives to work towards a stated goal.

Q: Why should clients choose GCP?

O'Brien A: We are a firm built on strong ethical and moral values. We measure our success by helping our clients achieve their financial goals. In a sense, their success is our success. Gill Capital Partners has experienced little client attrition and the majority of our new clients find us by word of mouth and referrals. Client trust and confidence is something we take very seriously.

Winslow A: Although our core business is managing investor money, we spend a large amount of time with clients looking at all aspects of their lives as it relates to finances. Clients want advice and feedback on all financial decisions and we are here to provide it.

Q: What is the GCP advantage?

O'Brien A: Being a small firm allows us to be nimble and change with the times. The economy, the markets, and the tax laws are always changing. We help our clients avoid the adverse affects of those changes but making appropriate adjustments – always ensuring our clients stay on track with their goals.

Winslow A: As an independent, fee based wealth management firm, we align ourselves with the client on many aspects. From investment philosophy to how we are compensated, our clients know what we want to accomplish and the steps we are going to take together to get there.

Q: What's your approach to client service?

O'Brien A: Our model provides clients with a seamless, high level of service using a team approach. The team consists of a relationship manager, portfolio manager, client service manager, CFP®, and a CPA. Our team is very knowledgeable with a combined 100+ years of real-world experience in all financial disciplines, including portfolio management, tax planning, estate planning, and charitable giving.

Winslow A: In our offices, we take a team approach to giving our clients the best possible service. Each client has more than one contact at the firm and each contact has intimate knowledge of the client's situation. We collaborate daily to find solutions to help our clients best reach their goals. Whether it is retirement, buying a new car or deciding how best to utilize available cash, we provide our clients with options they may not have had the time to pursue.

Q: What makes your wealth management offering unique?

Winslow A: We review all aspects of our clients' financial lives and help them organize and execute. Our clients lead busy lives; they are active at home and work and in many different parts of the community. We step in to give them the freedom to pursue their chosen activities by helping with everything from day-to-day finances to long-term charitable planning.

Q: What services do you offer for companies, including start-ups?

O'Brien A: We work with small- and medium-sized businesses. Our services help start-ups determine the best legal structure to protect their personal assets while obtaining optimum tax benefits. We help entrepreneurs capitalize upon their new business using their existing retirement plan assets, and providing a viable alternative to traditional borrowing. Finally, GCP provides tax planning and preparation, accounting services, and retirement plan design and implementation.

Q: When you started business 30 years ago, you were one of the first offering Institutional Services for Colorado public entities, banks, and municipalities. How have you sustained and grown this business?

Winslow A: As the population of Colorado has grown, so have the needs of these types of clients. Clients who had small budgets just a few years ago, now control millions of dollars and have to serve the needs of a growing population that demands more infrastructure and service. Through our investment process and unique knowledge of these clients, we have provided stability and growth for clients who need to produce investment returns. Our longstanding relationships are a testament to the service and expertise that we bring to this specialized group of clients.

Q: What do you do to ensure firm stability in a rough economic environment?

O'Brien A: Communication is paramount in times of uncertainty. We empower our clients by educating them on the current state of the market and economy, discussing how it may impact their investment portfolio. More importantly, clients want to know that we have a strategy to navigate difficult times. Investment strategies need to be agile as our world is becoming more complex and dynamic.

Winslow A: Different clients have different needs, and knowing what each investor expects and is comfortable with helps us through all types of markets. Times such as these require more communication with clients – to not only listen to their concerns, but to take necessary action steps. Investors with longer time horizons should be using this market as an opportunity, while those in retirement need to evaluate their risk tolerances and adjust appropriately.

Q: What should today's investor be on the lookout for?

O'Brien A: Investors need to be aware of investments that are too good to be true. This sounds obvious, but I have seen intelligent people get drawn into investments offering high returns, only to learn that it was a scam resulting in loss of their entire investment. And when that happens, the victim has little, if any, legal recourse. If an investment seems too good to be true, then it probably is. If you have an opportunity to make large returns with little or no risk, my advice is to pass. When evaluating an investment opportunity, stick to products that are regulated by either State or Federal securities laws. When working with an advisor, perform a background check prior to engaging their services.

Q: How can today's typical investor find an advisor that's a good fit?

Winslow A: The right fit on many different levels. When it comes to investing and planning for the future, you need to know that your advisor understands what you want to achieve. Emotions come into play in this business and it is crucial that an investor and advisor are on the same page at all times. Investors should not be talked into anything. They should look for an advisor that will listen and help them achieve their goals, not those of the advisor.

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