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Gill Capital Partners – Joe Giulitto and Kristi Sullivan join the team

Gill Capital Partners welcomes two new members to the firm: Joe Giulitto, Director of Business Development; and Kristi Sullivan, Certified Financial Planner™.

Giulitto comes to Gill Capital Partners by way of Charles Schwab as a VP, Financial Consultant. Prior to his nine years with Charles Schwab, Giulitto worked for American Express. As Gill Capital Partners' Director of Business Development, Giulitto seeks transparent client relationships – a two-way conversation that leads to the best solutions for all clients.

Before starting her own company, Sullivan Financial Planning, LLC, Sullivan worked for Fidelity Investments and Great-West Life and Annuity. Sullivan has over 14 years experience helping clients prioritize their financial goals. She has partnered with Gill Capital Partners to offer clients comprehensive financial plans.

With the addition of Giulitto and Sullivan, Gill Capital Partners has even more resources to help clients put dreams into plans into actions.

Joe Giulitto Q&A

What's the most rewarding aspect of working in financial services?
When I started in the financial industry, I found there to be an element of magic to how things work. The deeper I went into unraveling the magic, the more intriguing things got. For me to bring transparency and education to clients is like revealing a bit of that magic.

How do you define "The Capital Difference" (i.e. what makes Gill Capital Partners different from other financial service providers)?
Gill Capital Partners represents the freedom to choose. Gill Capital Partners is not restricted by big business politics or pushed to sell the next hot product. Gill Capital Partners has the flexibility to find what best fits are client's needs and deliver that exact solution to them.

What are you currently investing/saving for?
Investing is all about saving for the future. My boys – Joey and Vinny. My wife – Angela. I want to be able to enjoy every moment to the fullest. It's a reward to be able to provide to those you love that which you didn't have.

How do you deliver great client service?
Take time to listen. Everyone has a great story.

Kristi Sullivan Q&A

What's the most rewarding aspect of working in financial services?
My two favorite parts of working in financial services are educating clients and helping them prioritize their savings goals. Too many people have been told by the media or past advisors that investing is too complicated for them to understand. They have been overwhelmed by industry jargon that can be easily explained by someone willing to take the time to inform his/her clients. I also like looking at families' goals in relation to their abilities and restrictions. Often, people are worried about too many things at a time. It just takes an outsider to look at the situation and help them pick the goals they are going to work on this year, next year, next decade, and so on. The relief clients express at having a plan laid out for them is a huge reward to me.

How do you define "The Capital Difference" (i.e. what makes Gill Capital Partners different from other financial service providers)?
What makes Gill Capital Partners different from many wealth managers I've met is their constant drive to improve their customer experience. James O'Brien and John Winslow are willing to invest in new software and personnel to strive for the ultimate result: Clients' success in funding their life's purpose.

What are you currently investing/saving for?
Currently, I'm saving for college education for my children (ages 3 and 5) and retirement for my husband and myself. We love to travel, so our retirement savings goal is to be able to fund all the trips we would like to take.

How do you deliver great client service?
My 14 years of experience helping people of all ages plan for various life goals has taught me that no two circumstances are alike. I listen hard to my clients and never assume that a solution that's been used before will fit the next person's situation. I also ask very detailed questions that go beyond, "what assets do you have?" to really exploring a person's values. My goal is that the plan we put in place balances enjoyment of life today with planning for the dreamed-of tomorrow.

About Gill Capital Partners.

Gill Capital Partners is an independent Colorado financial services firm, serving clients since 1983. Their suite of services includes wealth management, institutional services and corporate services. Gill Capital Partners is a broker/dealer and a registered investment advisor. To learn more about the Capital Difference, please contact Gill Capital Partners at 303.296.6260 or www.gillinvest.com.

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