



Gill Capital Partners
2022 Annual Report



CULTIVATING CAPITAL, CULTIVATING CONFIDENCE



Dear Clients, Partners and Friends of **GILL CAPITAL PARTNERS**,

In business and in life, it is human nature to be distracted by the latest news story, technology development, or the continuous flow of information in this digital age. We want our clients and partners to know that we will always remain focused on you, your best interests, and your long-term success. Last year was very challenging as the markets digested a monumental policy shift in interest rates from the Federal Reserve in the form of seven rate hikes, totaling 4.25%, in the span of ten months.

This dramatic move in such a short period of time, coupled with sticky inflation and geopolitical unrest, brought about a great deal of uncertainty and volatility in the markets. Our commitment to you is to be your trusted financial partner through *all* markets, good and bad, and to maintain the highest ethical standards and transparency in everything we do. While the stock and bond markets may waver, our commitment to you will not.

We look forward to the future and will continue to focus on the goals and needs of our clients. Thank you for your partnership!



John Winslow
Managing Partner



James O'Brien, CFP®
Managing Partner

College **PLANNING**

In 2022, we expanded our financial planning offering with a new program from College Aid Pro. College Aid Pro allows us to demystify the college financial aid process by providing insight into the financial aid application process, admissions data, school rankings, and scholarship opportunities. With College Aid Pro, we are able to identify the schools that will give students the most money in both merit- and need-based scholarships while aligning with their preferred major, location, size, and more.

If you have a high school student and would like our help through the college financial planning process, please reach out to your advisor.



Meet the Team — QUESTION & ANSWER

“What is the best thing about working at GCP?”



TOM

The people I work with and the integrity with which everyone goes about their business day in and day out — and we all have fun in the process.



JOHN W.

While the snacks are amazing, the relationships with our clients and the team are even better.



RAY

Our people!



SAMMI

The culture. We all enjoy working together and that makes it for me!



LESLIE

We live by our core values on a daily basis, and that drives amazing client service and an awesome culture.



KAYLA

The company culture. It is great working with a positive and supportive team!



TERRI

Everything! Clients, the amazing team around me, culture and, most of all, sabbaticals!



TRACI

GCP values, how much management appreciates their employees, and my coworkers.



KELLEY

The people and culture!



ERIN

The people and the agency over my decisions.



JESS

The ability to show up and thrive in an authentically driven culture.



CHRISTINE

The people! I truly enjoy all my coworkers and the opportunity to get to know all our clients.



PAUL

Working with Erin and the rest of the team.



JAMES

I appreciate interacting with my peers and helping our clients make smart financial decisions.



CHAD

Our unique culture. We take our jobs seriously but never ourselves.



JOHN B.

Everything is done by committee and all opinions are valued.



Gill Capital Partners 2022 SPEAKER SERIES

In 2022, Gill Capital Partners continued to provide relevant and timely education to help our clients stay on beat. Topics included the Russia-Ukraine war, the local and global economy, and navigating the world of college planning and financial aid. As always, the goal of our Speaker Series events is to bring quality education to our clients by providing them the opportunity to hear from experts on relevant topics.



DAVID LEBOVITZ

*Executive Director, Global
Market Strategist, J.P. Morgan
Russia-Ukraine Conflict*



JEFFERY KLEINTOP

*Chief Global Investment
Strategist at Charles Schwab
Market Update*



JOE MESSINGER

*Co-Founder, Director of Advisor
Solutions at College Aid Pro™
College Funding*



JOHN TOUSLEY

*Senior Strategist, Goldman Sachs
Asset Management's Strategic
Advisory Solutions
Geopolitical Update*



**DR. RICHARD L.
WOBEKIND**

*University of Colorado's
Leading Economist
2022 Economic Outlook*

Gill Capital Partners **GIVES BACK**

We believe in supporting the needs of our community through service and financial support. In addition to directly supporting various charities, Gill Capital Partners offers employees a charity matching program and paid time off to volunteer. In keeping with our core value "Give Back," Gill Capital Partners and our employees supported The Santa Claus Shop, The Dumb Friends League, The Epilepsy Foundation, The Children's Museum, A Precious Child, The Preservery Foundation, Denver Public Schools Foundation, The Heights Foundation, and St. John's University in 2022.



The Year In REVIEW

- Jess Vega joined the Gill Capital Partners team as our Client Experience Coordinator.
- Gill Capital Partners hit a hole in one at our Inaugural Women's Golf Scramble. 36 women participated in a Par 3 Best Ball Golf Scramble, with the top three teams winning a donation from Gill Capital Partners to their charities of choice. These charities included Tunnels to Towers Foundation, Children's Future, St. Francis of Assisi Catholic Church, The Master's Apprentice, World Central Kitchen, and Project Cure. We want to thank Windsor Gardens Retirement Community for their use of their beautiful course and the 36 participants for making this so successful.
- Christine White added a new designation, Certified Private Wealth Advisor®, to her resume.
- We had another successful Toy Drive, thanks to the generosity of our clients. Together, we supported local families through the Santa Claus Shop to ensure every child had a gift under the tree. This year, our own Tom Cladis stepped in as "Santa" to help spread the holiday cheer.



Sowing the SEEDS

Gill Capital Partners is appreciative of referrals from our clients and professional partners. If you know someone who might benefit from our expertise, we would appreciate you referring them to us. We are committed to delivering the same level of service and care that you have experienced at Gill Capital Partners. We look forward to the opportunity to be a trusted partner to your friends, family, and colleagues, and we are thankful for the trust you have placed in us.



2023 Client Appreciation **EVENT**

SAVE THE DATE! Our annual Client Appreciation Event is swinging once again! Please join us for a fun evening of big band music with the Flatirons Jazz Orchestra, some delicious fall food from Biscuits and Berries, and dance lessons and performances from Swingin' Denver.

Our event is Friday, October 6th at Wings Over the Rockies from 6:00 pm to 9:00 pm.



It's Our 40th ANNIVERSARY

Gill Capital Partners will be celebrating its 40th anniversary in August of this year! For forty years we have provided clients with independent, unbiased, and ethical financial advice. We have evolved over the years, but one thing has remained constant: we live by our core values, putting our clients first, kicking ass every day, checking our egos at the door,



giving back to our community, and owning it (both our successes and our mistakes). These core values have allowed us to deliver an amazing client experience and build a truly special culture. We look forward to delivering on our promise to you for many years to come.



About Gill Capital Partners

Gill Capital Partners is an independent Colorado financial services firm, serving clients since 1983. Our suite of services includes private wealth management, institutional services and corporate services. We help clients grow and protect their assets, one interaction at a time. To learn more, please contact Gill Capital Partners.

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Gill Capital Partners

Member: FINRA-SIPC