



ASPEN FINANCIAL MANAGEMENT, INC.

REGISTERED INVESTMENT ADVISORS



“Being a fee based financial advisor positions me at the pinnacle of individual client asset management. Fee based management gives the advantage to both the client and the advisor. The client has access to unbiased advice and the best investments. And fundamentally the advisor shares in the success of the client.”

As an advisor, Jerry Becker enjoys the integration of financial planning with personal portfolio management. “Bringing the two areas together provides a better experience for the client. The financial plan is the key, providing a financial roadmap to follow, pointing the way to achieve the client’s goals.” The plan details what is required of the client and the advisor, what resources to allocate to the goal, over what period and at what growth rate. Because the client is very much involved in the planning, a better understanding of the investing process is achieved early on. This up front involvement enhances the ability of the client to understand the nature of investments, assuring that the allocation of assets will remain within the client’s risk tolerance. Jerry knows that if the client understands the investment process, the chance for success is vastly increased. His many years of experience smoothes this journey.

Jerry was an honors graduate in engineering at Texas A&M University. His distinguished engineering career includes Lead Engineer with Westinghouse; Prototype Designer with GeoSpace Corporation; Founding Partner of Industrial Educational Services, Inc., a consulting firm to engineers involved in Prototype Development; and also Founder of SunSmith Corporation a solar energy pioneer. Jerry was an educator at Texas A&M University, advancing to Division Head of the Electronics Training Division. His financial background includes Investment Representative with Edward Jones Investments then Main Street Management Company, a brokerage firm for independent representatives. Having a diverse background has prepared him for his present firm. Aspen Financial Management, Inc. was tailored to put the client first. It fosters bringing together the best people in the field to design the best possible investment environment for the client “I have enjoyed several careers, but find that the role as an independent investment advisor is particularly rewarding - helping my clients achieve their financial goals. It is such a pleasure to share in a client’s success.”

A native of Taos, New Mexico, Jerry believes in giving back to the community. He is a founding member of the Taos Milagro Rotary Club, a strong community service organization. He also sponsored and founded the Angel Fire Rotary Club. He is on the Board of Directors and fundraiser for the Gateway Museum in Eagle Nest and is a past Treasure and member of the Board of the Taos Historical Museums. He serves on the Financial Committee for Communities Against Violence. He helped establish Camp Howdy, a Girl Scout Camp and enjoyed being an active Boy Scout leader and District Executive. Family time is important to him. In his off time, he enjoys many outdoor pursuits with his wife Sue, a retired educator. Between them, they have six very successful children and eight beautiful grandchildren.

Series 65

Registered Investment Advisor Representative

Insurance

Life, Disability, Long Term Care and Annuities

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