



Garrett W. Moretz Biography and Fact Sheet

Garrett W. Moretz is recognized as a leading expert on safe investment alternatives as well as investment management. He is an independent financial advisor who has been helping consumers with tax advantaged investment alternatives for over 21 years.

Garrett has created a service that caters to people who are frustrated with low interest CD's and are rightfully scared of the crazy and risky stock market but still want higher interest and rates of return. His services help consumers find alternatives to not only safely protect their nest eggs but that also provide many tax advantages and growth. Garrett also specializes in long-term financial planning for pre-retired and retirees, including but not limited to, investment planning and estate planning.

Garrett has earned the distinguished Certified Financial Fiduciary® (CFF) designation. He has also earned the Global Financial Steward (GFS) designation.

Garrett's business, Moretz Wealth Management, LLC, is based in Mooresville, North Carolina but he services consumers throughout the United States. He is a dedicated family man with a wife, Julie, and three sons, Kessell, Caleb and Noah. Garrett has lived in the town of Mooresville, NC for 22 years after moving from Huntersville, NC. He is originally from Alexander County in the foothills of North Carolina. Garrett attended both the University of South Carolina and Montreat College in Charlotte, NC where he studied business administration and supervision. He has been affiliated with American Express Financial Advisors of Minneapolis, MN, Synergy Investment Group of Kannapolis, NC, Allegiant Financial of Miami, FL and First Heartland Capital of Lake St. Louis, MO. He is currently affiliated with LifeMark Securities Corporation of Rochester, NY. Garrett is a member in good standing of the Financial Planning Association (www.FPAnet.org). He is also a five-star advisor associated with the Paladin Registry, an exclusive registry documenting the top financial advisors in the industry. His profile can be viewed at www.paladinregistry.com, www.ethicscheck.com and www.fpanet.org. Also, please visit www.moretzwealthmanagement.com for more information and photos of Garrett and his family.



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A graphic for a challenge coin. On the left is a circular coin with a gold rope border. The word "3ethos" is at the top. The three interlocking rings are colored green, orange, and red. The words "Leadership", "Governance", and "Stewardship" are written around the rings. To the right of the coin is a green oval with a gold rope border containing the text "Be the inspiration for moral, ethical and prudent decision-making".

This challenge coin is awarded to graduates of the GFS course who have achieved certification.