

## OUR VALUE PROPOSITION

Our value proposition is to educate and guide our clients and their professional advisors so that they are positioned to make the best possible decision for their unique situation. We also manage our client's expectations so that the outcome we provide facilitates the most advantageous results.

Most importantly, we represent our clients to the insurance marketplace. This allows us to provide objective advice through multiple carrier relationships. As a Member Firm of M Financial Group, we have access to a network of the highest quality insurance carriers, proprietary insurance products, as well as the best minds in the industry. We do not represent—and are not incentivized to represent—just one carrier.

Our firm operates as a team. This means that we dedicate the most appropriate resources to each client and their particular situation. Between our partners and professional staff there is a wealth of diverse insurance experience and skill that can address the unique needs of our clients and their advisors.

*"I am consistently pleased at the degree of sophistication GWE demonstrates across the full spectrum of insurance, compensation, and benefit programs, often turning problems into solutions."*

– Attorney  
Fairfax, VA



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Please visit our website for additional information and to view our current articles and updated staff bios.

SECURITIES AND INVESTMENT ADVISORY SERVICES OFFERED THROUGH M HOLDINGS SECURITIES, INC., A REGISTERED BROKER/DEALER AND INVESTMENT ADVISOR, MEMBER FINRA/SIPC. GREENBERG, WEXLER & EIG, LLC (GWE) IS INDEPENDENTLY OWNED AND OPERATED. FOR MORE INFORMATION ON GWE'S RELATIONSHIP WITH M FINANCIAL GROUP, VISIT [WWW.MFIN.COM](http://WWW.MFIN.COM).



*Thought of for how much we know...  
Known for how much we care.*



M Financial Group™  
Member Firm

*The collaborative power of unique,  
independent firms.*

## WHAT WE DO

At Greenberg, Wexler & Eig, LLC, we use our knowledge, creative thinking, and resources to deliver a superior experience to each individual and business.

Our community of clients consists of some of the most affluent families and highly successful businesses, as well as those who are on their journey to success. As our clients work to protect and grow their success, they know and appreciate that their insurance and benefit needs are in the hands of knowledgeable and experienced professionals who work as a team.

This is Greenberg, Wexler & Eig.

*"My confidence in your firm surpasses simply knowing that the families you work with are in capable hands. The team at GWE offers the perfect blend of experience, knowledge and compassion that my clients, friends, and family deserve."*

– Financial Planner  
McLean, VA

## OUR SERVICES

Greenberg, Wexler & Eig provides customized insurance consulting services and strategic product placement for individuals and businesses, including:

### *WEALTH TRANSFER*

Successful individuals understand the effort involved in creating and maintaining personal wealth, but do not always realize how quickly estate taxes could potentially sweep a significant portion of this wealth away. GWE can help mitigate the emerging liability facing your estate, so that more of your wealth ends up where you want it.

### *CONTINGENCY PLANNING*

Families and businesses can work to secure their futures from the loss of a key income earner or executive with the help of simple planning techniques—coordinated with tax strategies—that guarantee the availability of necessary assets in the event of death, disability, or long-term illness.

### *EMPLOYEE BENEFITS*

Today's employee benefits environment is constantly changing, so it is important to make certain that your benefits program is efficient, effective, and appreciated. GWE can design, shop, implement, and communicate all aspects of your employee benefit program.

### *QUALIFIED RETIREMENT PLANS*

To ensure you have the most efficient and suitable plan based on your specific goals and criteria, our team will develop, deploy, and monitor the most effective retirement plan for your business and make sure it is coordinated with your overall employee benefits package.

Our clients can expect to receive the highest level of service and the most innovative solutions available. GWE is appreciated by our clients for our concern and trusted by their advisors for our knowledge.

## OUR TEAM

Our team is committed to serving successful individuals and businesses with creative solutions and state of the art products for the long term, taking advantage of maximum planning opportunities. Our vision is to be thought of for how much we know and known for how much we care. To learn more about our Principals and Associates, please visit our website at [www.gwellc.com](http://www.gwellc.com).

## PRINCIPALS

### *SCOTT A. GREENBERG, CLU*

Scott specializes in employee benefits, including health insurance programs and qualified retirement plans. He is also a frequent speaker and author, conducting seminars for the insurance, accounting, legal, and medical communities.

### *DAVID WEXLER, CLU, ChFC*

David is a recognized authority in estate planning, succession planning, and executive compensation plans. He also supports members of the GWE team with quantitative and spreadsheet analysis and tax insight.

### *KEITH M. EIG, CLU*

Keith specializes in Life, Disability, and Long Term Care insurance and serves as the firm's Managing Partner. Keith is also very involved with the Greater Washington Foundation of Insurance and Financial Advisors.

## A MEMBER FIRM OF M FINANCIAL GROUP

With more than 125 Member Firms, M Financial Group is one of the nation's leading financial services design and distribution companies. Since 1978, M Financial's network of independent insurance, investment, and executive benefit firms—like Greenberg, Wexler & Eig, LLC—has served the needs of ultra-affluent individuals, corporate executives, successful entrepreneurs, and *Fortune 1000* companies.