TRAJAN® WEALTH

UP TO

$500 OFF

TRAJAN® WEALTH

New Year, New Goals

CERTIFICATE

OF REFERRAL

A friend or family member took the first step toward helping you start your retirement savings journey. You will receive one month of fees up to $500 off upon becoming a client!* Restrictions do apply.

*Qualification notes:

- New client to Trajan Wealth with a minimum investment of $100,000.
- Must be redeemed in 2026.
- Up to a $500 Credit is applied to both accounts after the referral becomes a client.

TW Referrer

Jeff Junior, Founder & CEO

Date

*The person who referred you is a client of Trajan Wealth. Non-cash compensation will be provided for referral. No conflict of interest exists.

Why work with Trajan?

Starting on a foundation of mutual respect and understanding, we will dedicate the time needed to listen to your goals and educate you on the options. As an independent firm, we're not bound to just one line of products or portfolios. We have the ability to customize a portfolio to meet your own unique goals and needs.

FIDUCIARIES

We are fiduciaries, and it's an obligation of the highest degree for us to act in your best interest at all times. Plus, our advisors are not dually registered as brokers.

EDUCATION

We employ individuals with hearts of teachers who share high values. We won't talk down to you or use fancy financial or legal jargon without explanation.

TRANSPARENCY

We have a straightforward, flat percentage fee for money management. We will also disclose any conflicts of interest.

All Under One Roof

Retirement, tax and estate planning go hand in hand.
We are proud to offer these services together, in one place, to save you time.

Book your consultation today!
CALL TODAY: **1 (800) 838-3079**

*Advisory services are offered through Trajan® Wealth, LLC, an SEC registered investment advisor. Annuity guarantees are based on the claims paying ability of the issuing insurance company. Any examples provided are hypothetical. Annuities are issued with prospectus and sales brochures and should be reviewed carefully before funding as features and benefits vary. D.B.A. in most states as Trajan® Wealth Insurance Solutions. Trajan® Estate, LLC is an estate planning law firm providing legal services in Arizona and Utah and does not provide financial advisory services. Trajan® Estate, LLC's principals are Kent Phelps and Jeff Junior. Jeff Junior is also a principal of Trajan® Wealth, LLC, an SEC registered investment advisor. Fiduciary advisor not dually licensed as a securities broker and not able to sell securities for a commission. Trajan® Wealth, LLC does not provide legal services. Trajan® Estate, LLC and Trajan® Wealth, LLC have entered into arrangements in which Trajan Estate, LLC refers clients with financial advisory needs exclusively to Trajan® Wealth, LLC, and Trajan® Wealth LLC refers clients with estate planning legal needs exclusively to Trajan® Estate, LLC. Legal services in states outside of Arizona and Utah are provided by independent law firms. Tax services offered through Trajan® Tax LLC . Trajan Wealth, LLC may refer qualified clients to Trajan® Tax LLC for tax services. Trajan® Tax LLC may refer clients to Trajan Wealth, LLC for advisory services.

*The person who referred you is a client of Trajan Wealth. Non-cash compensation will be provided for referral. No conflict of interest exists.