



SO

who is Nicolas Mauricio?



GWM USA

Securing Your Future.

Wherever You Are Today.



Nicolas Mauricio

Senior Financial Advisor

Nicolas is a senior financial planner for GWM USA LLC. Having spent 3 years with Northwestern Mutual a U.S based planning firm, he aims to provide a strong knowledge base and great work ethic to our firm. Originally from San Antonio, Texas he is now based in Miami and well placed to work with current and new clients.

Nicolas studied at Texas State University where he graduated with a degree in Finance. Once completed, he received his series 6, series 63, and Life & Health certifications. With the vast knowledge U.S based investments and insurance, he aims to provide our clients with the finest experience in financial planning.



GWM USA

Advisory Services offered and provided through Beacon Global Advisor Network, LLC.
No guarantees of investment success are offered. Investing involves risk including the loss of principal.

WHO ARE GWM?

GWM began in the UK over 20 years ago and today we have offices in many of the world's largest financial centres including; Geneva, Dubai, Abu Dhabi, London and Miami. GWM are fully regulated within every jurisdiction in which we operate and are supported by a global services department that are authorised to assist you with financial advice 24/7, wherever you are in the world. This client-centric approach to financial planning provides clients with the certainty that wherever they are, GWM are alongside them.

Nicolas is fully qualified to advise in all areas of personal financial planning including:

- ① U.K. pensions
- ① IHT planning
- ① US pensions including 401k rollovers
- ① US insurance
- ① Retirement planning
- ① Wealth management

Managed Portfolio Service

- ① Quarterly reviews of your portfolio
- ① Yearly in depth assessment of your overall financial plan and tax requirements
- ① Full access to the investment and tax planning team
- ① Capital Protected Investments



GWM USA

Advisory Services offered and provided through Beacon Global Advisor Network, LLC.
No guarantees of investment success are offered. Investing involves risk including the loss of principal.

From Our Office In The Heart Of Miami's Main Financial District



GWM's International reputation is of the highest level amongst its clients and peers.



GWM USA's team of experienced financial planning experts provide independent and regulated advice to international professionals and global investors across the USA. We understand the local hurdles that expats need to overcome and have first-hand knowledge of how to use your international status to successfully achieve your investment goals.

Lifestyle Financial Planning

Aside from the lifestyle and experience, UK expats relocate to the USA in search of an improved way of life and higher salary. This increased earning potential presents a great opportunity to save for your future while you're away.

Find out if you are making the most of your money?

GWM USA advisers will help protect and grow your wealth to ensure it works as hard for you, as you did to earn it in the first place. And create a flexible plan based on your income and expenditure that caters for more than just your retirement.



GWM USA



Nicolas Mauricio

Senior Financial Advisor

One Team. Multi-Expertise. Tailor-Made Solutions.



Christine Ashwell

Associate

Christine built up her knowledge over a five year period and brought her skills over to GWM in 2018 where she now supports the USA team and clients ensuring the transfer of benefits runs smoothly and quickly as possible. Christine is currently working towards her qualifications in pensions and retirement planning.



Jennifer Vega

Associate

Jennifer joined GWM USA over a year ago to provide leadership and support to all members of the advisory team. As part of her role Jennifer is responsible for all office procedures, and uses her exceptional organizational skills to ensure a smooth client journey.

Meet Your Investment Specialists

Our carefully measured, committee led approach enables us to create and manage unique and tailor-made portfolios covering the full spectrum of management styles, strategies and asset classes.



Iain Ramsay

Chief Investment Officer

Iain has an astute passion for identifying timely investment opportunities in financial markets and a deep understanding of adapting to changing global market conditions. He is readily available to advise Nicolas' clients as well as consult with Nicolas proactively of any foreseen changes and opportunities.



Carla Smart

Trust & Pension Specialist

Carla specialises in helping people to plan for their ideal retirement. She has completed numerous UK and International financial qualifications, including her Diploma in Regulated Financial Planning, her AF3 Pension Planning and AFI Personal tax and trust planning exam. She is able to use this knowledge for the benefit of Nicolas' clients.

GWM-USA is a division of GWM. GWM-USA has access to other professionals based in the United Kingdom for support. The above individuals are not licensed with Beacon Global Advisor Network, LLC. The individuals are employees of GWM.

Securing Your Future.

Wherever You Are Today.

Nicolas Mauricio

Senior Financial Advisor

1450 Brickell Ave,
Suite 2180, Miami
FL 33131

Email: nicolas.mauricio@gwm-usa-llc.com

Mobile: +1 210 997 4888

Office: +1 786 408 7703



GWM USA

UK Europe Switzerland Middle East USA

Email: info@gwm-intl.com

Web: www.gwm-usa-llc.com

Award Winning Advice & Technology



GWM USA LLC is part of the GWM for all Group regulatory details please visit <https://www.guardianwealthmanagement.com/about-menu/regulations>. GWM USA LLC through its advisors offers investment and financial advisory services through Beacon Global Advisor Network, LLC (BGAN), a registered investment adviser with the Securities and Exchange Commission (SEC).

SEC number : 801-110724 : CRD number is 288833. Registration with the SEC does not imply a certain level of experience or education and does not mean the SEC approves or endorses BGAN.