



*Dedicated to Serving the Financial Planning Needs  
of the International School Community.*



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[www.GlobalAdvisorGroup.com](http://www.GlobalAdvisorGroup.com)

Founded by industry veteran and CEO, James T. Barnette, Jr., CFP®, Global Advisor Group provides financial planning and wealth management services to individuals and institutions in all 50 states and over 50 countries around the world.



*"As a **CERTIFIED FINANCIAL PLANNER™** professional, I have the **fiduciary responsibility** to uphold the highest standard of client service for financial advice and planning. Our financial advisors utilize their industry experience to assist expatriate Americans, foreign nationals, and international school institutions with their financial planning needs, offering guidance grounded in integrity, objectivity, and professional insight."*

A handwritten signature in black ink that reads "James".

James T. Barnette, Jr., CFP®  
CEO, Global Advisor Group



# PERSONAL FINANCIAL PLANNING



**One-on-one support**, for every stage of your financial journey.

## Investment Management



We help employees navigate the complex investment landscape with confidence. We offer a wide array of strategies tailored to your investment objectives, risk tolerance, and long-term financial goals.

## Tax Planning



We specialize in assisting expatriate Americans to fully leverage the tax advantages available to them while living abroad. We dedicate significant time to ensure they are maximizing their tax benefits.

## Retirement Planning



We help hundreds of clients in preparing for retirement. Our process begins with a comprehensive review of your financial picture and retirement aspirations.

## Asset Consolidation



Managing financial assets while working in various locations can be challenging. We can help consolidate accounts into a single location, offering an organized and holistic approach to financial management.



# GROUP RETIREMENT PLANS

## Why Offer a Group Retirement Plan?

Offering a retirement benefit is a key component for international schools to attract and retain top-tier educators. An employer-sponsored retirement plan allows schools to contribute directly to employees' accounts, significantly boosting their overall retirement savings.



### Partner with Global Advisor Group

When you partner with Global Advisor Group, your employees gain access to valuable educational resources and support to confidently navigate their retirement journey.



### Experience You Can Value

For over **20 years** we've been working with international schools to establish and administer retirement plans. We service IRS qualified Roth 401(k) plans and non-qualified Matched Savings Plans, providing flexible strategies to meet diverse needs.



### Tailored Strategies for Your School

We work closely with each school's administration to understand their unique objectives. By considering local regulations, we design retirement plans that align with the specific needs of each organization.

Investment Advice offered through Private Advisor Group, LLC, a Registered Investment Advisor.  
Private Advisor Group, LLC and Global Advisor Group are separate entities.



# INSTITUTIONAL INVESTMENT MANAGEMENT



## Tailored Strategies for Institutions

Our process begins with understanding your organization's mandates, finances, and goals for building an institutional investment portfolio.

We establish an Investment Policy Statement (IPS) and sound governance to ensure that investment decisions align with the institution's goals.

## A Collaborative & Flexible Approach

Our collaborative process ensures ongoing evaluation and adjustments, maintaining flexibility within acceptable risk as markets evolve.

## Our Expertise is Applied Across Three Levels

1

Risk ranges and rebalancing guidelines are established around target allocations to various asset classes used in the portfolio.

2

Due diligence and selection of portfolio managers are practiced to offer a reasonable probability of helping achieve the stated objectives.

3

The progress of the portfolio is monitored on an ongoing basis, including reporting, review meetings, and recommending adjustments when circumstances warrant.



# INSTITUTIONAL CASH MANAGEMENT



## Seeking to Maximize Returns on Cash Balances

We specialize in helping organizations seeking to earn higher returns on their cash reserves through tailored cash management strategies.



## A Guided Approach to Cash Management

Our strategies go beyond traditional bank rates, offering more conducive options for potentially higher-yielding investments.



## Flexible Strategies for Your Needs

Whether managing an operating budget or reserve funds, we leverage opportunities such as money markets and alternative cash investments to potentially enhance cash yields.

## Optimize Cash Reserves with Balanced, Strategic Growth.

There can be no assurance that any investment process or strategy will achieve its objective. As with any investment vehicle there is always the potential for gains as well as the possibility of losses.





## OUR SERVICE TEAM



**James T. Barnette, Jr. CFP®**  
Chief Executive Officer



**Joan Confoy CFP®, CPFA®, AIF®**  
Director of Group Retirement  
Plan Services



**Nathan Barnette CFP®, CPFA®**  
Retirement Plan Consultant



**Julia Simmons**  
EARCOS | NESA



**Lone Bjork**  
Europe



**Nathan Addo CFP®**  
AISA



**Rodrigo de la Roca CFP®**  
Tri-Association | AMISA



**Asif Kuchey**  
Pakistan



**Daniel Malloy**  
Institutions & Endowments

Investors should consider the investment objectives, risks, charges and expenses of the funds. This and other important information about the investment company are contained in the prospectus, which can be obtained from your financial advisor and should be read carefully before investing.

Investment Advice offered through Private Advisor Group, LLC, a Registered Investment Advisor. Global Advisor Group, Interactive

Brokers and Private Advisor Group, LLC are separate entities.



Contact Us...

Because Our Clients Are Our World.



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M-F 8:30 AM - 5:30 PM ET

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our website



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and Global Advisor Group are separate entities.