# DR. GUY E. BAKER

## Wealth Counseling

A sophisticated Wealth Coach, Guy has extensive experience in financial planning, investments and life insurance. With over 50 years in the industry, Guy has been featured on numerous talk shows and tele-video conferences, including speaking several times on the MDRT Main Platform. He was named by Worth Magazine, as one of the USA's top 250 planners and by 5 Star Professional as a 5 Star adviser. He was selected in 2019 as the 78th recipient of the John Newton Russell Award, the Financial Industry's highest honor.

Guy helped found the National Association of Family Wealth Counselors dedicated to helping high net worth families build legacy. He has lectured at various estate planning council meetings, spoken at CLU Institutes and was featured on six CLU Conferences. A frequent writer, speaker and quoted media source, Guy has lectured in more than 40 countries.

A prolific writer, his most recent book "**Simple Retirement Math**" follows "**The Great Wealth Erosion**" which details four factors investors must manage to improve portfolio performance. Other books include **"Manage Markets, Not Stocks"** and **"Investment Alchemy"** both are guides to understanding modern portfolio theory. He also wrote "**Market Tune-up**", **"Why People Buy"**, and **"Baker's Dozen - 13 Principles for Financial Success"**, each with over 50,000 in print. His bestselling booklet "**The Box**", an easily understood guide to the mathematics of life insurance. He also wrote **Maximize the Red Zone**, a guide for business succession.

## Professional Awards and Affiliations

Guy served as the 84th President of The Million Dollar Round Table – an association of Financial Professionals with over 65,000 members in 70 countries. ■ President MDRT Foundation in 2000. ■ Past Board Member, Advanced Association of Life Underwriters (AALU) ■Served two terms as President, National Association of Family Wealth Counselors. ■Awarded Pacific Life's Preston Hotchkiss "Distinguished Achievement Award". ■Elected to National Association of Estate Planning Council Hall of Fame 2005.

## Professional Experience

Guy established and manages three entities developed to address the Three Circles of Wealth for High Net Worth Families. ■ The Wealth Teams Alliance – a Registered Investment Advisor ■ BTA Advisory Group – a risk management company specializing in insurance and retirement. ■ BMI Consulting, a managing consulting firm helping business transition ownership ■ Internationally recognized as one of the World's Top Financial Professionals, Guy has qualified for MDRT 50 times and as a member Top of the Table 42 times.

## Education

■BS/Economics in 1967 from Claremont McKenna College ■MBA/Finance in 1968 from the University of Southern California. ■Master's in Financial Services (MSFS) ■ Master's in Management (MSM). ■ Chartered Life Underwriter (CLU) in 1972 ■Chartered Financial Consultant (ChFC) in 1981. ■Certified Financial Planner (CFP), ■ Registered Health Underwriter (RHU). Earned a Certified Family Wealth Counselor designation and is a Registered Investment Advisor. ■ AEP Distinguished awarded by the National Association of Estate Planning Councils. ■ Doctorate (PhD) in Financial and Retirement Planning in 2018.

## Community Service

### Current Involvement

■ An Elder at Grace Church in Laguna Niguel, Ca. ■ Member Past Presidents Council MDRT. ■ Board Member Global Teen Challenge International.

### Past Involvement

Guy served as ■ Board Chairman for American Family Living. ■ Board member of the Mission Hospital Foundation ■Major gifts committee for the Orange County Center for Performing Arts, ■ Fund raising committee for South Coast Repertory; ■ Advisory Board member for the South Coast YMCA, ■ Board member of Orange County Teen Challenge. ■ President of the Claremont McKenna Alumni Association ■ Member of CMC's Board of Trustees. ■ Founding Trustee Grace Classical Academy. ■ President's Council BIOLA University ■ Regional Board Member Link's International.

## To Contact Guy:

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