



GUY E. BAKER, MBA, MSFS, PhD

WEALTH COUNSELING

Guy is an experienced life insurance and wealth consultant with over 50 years of experience. He has appeared on numerous talk shows and tele-video conferences, including several times speaking on the Million Dollar Round Table (MDRT) Main Platform. He was named by Worth Magazine, as one of the USA's top 250 planners. OC Metro picked Guy as a 5 Star advisor in 2010-15.

Guy helped found the National Association of Family Wealth Counselors made up of professionals dedicated to providing legacy and wealth planning to high net worth families. He has lectured at various estate planning council meetings, spoken at several CLU Institutes and was featured at six CLU Conferences.

A frequent writer and speaker, Guy has spoken to advisors in more than 30 countries. His most recent book, "The Great Wealth Erosion," details the four factors investors need to manage to improve their portfolio performance. Guy has qualified for the Million Dollar Round Table 46 times and is one of only 30 to qualify more than 36 times for the Top of the Table.

Other books by Guy include "Manage Markets, Not Stocks" and "Invest Alchemy", which are both 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 40,000 in print. His bestselling booklet is "The Box", an easily understood guide to the mathematics of life insurance. In addition, he wrote "Maximize the RedZone", a guide for business owners.

PROFESSIONAL AWARDS & AFFILIATIONS

Guy served as the 84th President of The Million Dollar Round Table – the Premier Association of Financial Professionals with over 45,000 members in 80 countries. ● President of the MDRT Foundation in 200. ● Board Member, Advanced Association of Life Underwriters (AALU), Washington D. C. based, working with Congress to formulate industry responsive legislation. ● Served two terms as President, National Association of Family Wealth Counselors. ● Awarded Pacific

Life's Preston Hotchkis "Distinguished Achievement Award". ● Elected to National Association of Estate Planning Council Hall of Fame 2005.

PROFESSIONAL EXPERIENCE

Guy manages several entities developed to address the Three Circles of Wealth for High Net Worth (HNW) Families. ● CoManager with Dean McCormick, CPA – Insight Wealth Solutions, LP – a multi-disciplinary practice acting as wealth consultants for HNW families and businesses. ● Managing Director, BTA Advisory Group, a risk management consulting firm specializing in life insurance and 401(k)s. ● BMI Consulting, a national management consulting firm working with the problems facing closely held businesses – succession, executive compensation, and transition strategies. ● Wealth Teams Alliance, a Registered Investment Advisory Firm, ● Baker Jensen Investment Advisors, a registered investment advisor, and ● Alexander Beard USA, an international financial consulting firm in six countries.

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 ● Certified Financial Planner (CFP) ● Registered Investment Advisor ● AEP Distinguished Designation by the National Association of Estate Planning Councils ● He recently achieved receiving a PhD in Financial and Retirement Planning.

COMMUNITY SERVICE

Guy is currently Chairman of the Board of American Family Living ● An Elder at Grace Church in Laguna Niguel, CA ● Founding Trustee for Grace Classical Academy, a private school for families seeking a Christian Classical education ● President's Council for Biola University ● Regional Board member for Link's International

PAST INVOLVEMENTS

● 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

TO CONTACT GUY

15520 Rockfield Blvd ● Ste G ● Irvine, CA 92618
● TOLLFREE: (877) 282-4768 ● PHONE: (949) 900-0099
● FAX: (949) 900-0247 ● EMAIL: guy@wealth-teams.com
● www.wealth-teams.com ● www.bmiconsulting.com
● www.btgroup.net