

DURING THESE TIMES, WE NEED FINANCIAL ADVISORS WE CAN TRUST!

WHAT'S SO UNIQUE ABOUT FAMILY FOCUSED FINANCIAL?

First of all, they demonstrate **old fashioned values**, including: family, faith, honesty, hard work & house calls:

- *Members of the Financial Services Institute*
- References readily available from satisfied clients

Second, they provide both **comprehensive analysis** and **personal care**:

- They help people prepare for a *successful retirement* by addressing all **seven key areas** of retirement planning: **legal, tax, income, investments, risk, health, and legacy**.
- They use more of an **educational** approach than a sales system.
- And they develop a truly **personalized** plan of action for each client to follow vs. a cookie cutter pattern.
- They are **available**, following up on each contact promptly, personally & professionally.

Third, they can help almost anyone, but they specialize in helping people who are near, or in **retirement**. Often these people have unique questions and situations facing them:

- How do I pass on assets without the family fighting over money?
- How do I keep my lifetime tax liability to a minimum?
- How do I set up a diversified portfolio to match my personal risk tolerance?
- How do I optimize Social Security and how do I set up a plan to provide secure lifetime income?
- How does Medicare work? How do I keep from spending most of my savings on long-term care costs?
- How do I preserve my life savings from personal liability and identity theft?
- How do we invest our retirement years most impactfully?

Fourth, consultations are **complimentary**!

- When they are introduced to new people, they do not charge a fee for consultations.
- They work on an honor system...all they ask is that clients not take their ideas to another company.

Lastly, they achieve **results**:

- By helping clients preserve their hard-earned savings from the most common risks.
- By employing investment tools that major endowments use.
- By using simple ideas to multiply the value of the estate without investment risk.



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