IMPORTANT INFORMATION

It is more important than ever to be aware of the necessity for financial planning. People are confused with the economic turmoil and charges facing all of us today. Amid this environment, <u>what can you do to protect your family and shape your financial future?</u>

We not only want to help but feel it is our duty. We can assist you in finding solutions that work. In the future, we will call you with suggestions and strategies to help you plan for such matters as:

1. **Retirement Planning**
2. **Education for Children**
3. **Estate Planning**
4. **Income Tax Planning**
5. **Investment Planning**
6. **Asset Protection Planning**
7. **Asset Allocation Strategies**

<u>Clients should ask the following questions!</u>

1. ***Will my money run out when I retire?***
2. ***Can I afford to send my "kids to college"?***
3. ***Will I be able to retire early?***
4. ***What happens to my family if I die or become disabled?***
5. ***Are there any alternatives to CD's and Saving Accounts?***

We can offer piece of mind by prescribing a workable solution and a simple customized plan. Think of us as many of our clients do - "THEIR FINANCIAL DOCTOR". We can prescribe a preventive and progressive financial program.

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