Advisor Presentations™

Independent RIA Script

You may be an expert in your field, but it may be wise to turn to someone with expertise in showing you how to properly prepare for your retirement dreams.

We provide the information and products that help turn your financial dreams to reality. We are dedicated to providing the highest level of service and investment options to meet your unique goals and objectives. So you might be asking…… what is it that makes us more popular than other financial advisory firms?

Well, first of all, we are an independent firm. We are not held 'captive' to proprietary products and/or traditional investment strategies. Yet, we are still able to work with all the major insurance and mutual fund companies to provide best of breed investment and insurance products.

As a registered investment advisor or RIA, we act as your fiduciary. A fiduciary has a legal obligation to act in the best interest of you, the client. Most investment salespeople are not registered investment advisors, nor are they obligated to act as your fiduciary.

We all work hard! But managing investment dollars is a full time job. And you deserve a secure future without having to be an investment expert. You might not know the difference between a small cap growth fund and a large cap value fund, and when one is likely to outperform the other. But that's okay! Most of our clients do not want to spend the time and energy required to manage their own investments. We pride ourselves on helping you manage this important part of your life so you can concentrate on the things you do best. But not only do we help you save for a secure retirement future. We work with you *after* retirement to structure sensible income payouts from your 3 main sources of retirement income: your 401(k) plan, social security, and retirement savings. We will provide you a 'complete retirement income picture'.

Now you might be wondering… great, where do I start? Well, in order to determine if you are on the right track, here are 3 questions you should ask yourself right now!

1. Will I have enough income to retire when I want to? 2. Are my investments in the right place? 3. Do I have a plan in place to pass my remaining assets to the people and organizations I really care about?

We would like to provide you the answers to these 3 very important questions. We would like to be your partner in creating your personal retirement savings and income solution. So please… call or email today to schedule a no cost, no obligation consultation with a financial advisor. We might just be that retirement and financial expert that you have been looking for.

On Screen Disclaimer *(you can change this)*

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