Keep Your Assets. Take My Advice®

What is wrong with today's financial advice?

- You do not know who to trust.
- You fear being sold products that you do not understand and that have high fees.
- You do not want to be locked into products that you cannot get out of at a moments notice.
- You may have to pay thousands of dollars in commissions and incur a 10-year penalty to get out.
- You may be forced to pay a 1 to 2.5% or more of an assets under management fee to keep getting advice.
- You have to move your accounts before you receive the advice.
- Your free financial plan becomes an after-thought once you transfer your accounts.

What you really want is...

1. You would like **one secure login** to see all of your accounts in one place including bank, savings, credit cards, mortgage loans, student loans, investment accounts, retirement accounts, 401k's and more.
2. You would like a Financial Plan continuously updated 24/7 at a reasonable fee ***without*** having to move any of your accounts, plus **no additional fees** when your situation changes or when you add to your accounts.
3. You would like a simple way to give your Financial Planner your information ***without having to disclose any account numbers,*** make copies of all of your account statements, or fill out mounds of paperwork.
4. You would like a full-time Financial Planner who is a ***fiduciary*** working on your behalf for this reasonable fee and who truly is looking out for your best interests.
5. You would still like investment advice on your accounts ***without*** having to transfer them anywhere.
6. You would like the ***option*** of a robo-advisor at wholesale prices ***with no additional fee*** by your Financial Planner.
7. You would like flexibility in billing where you can pay monthly, quarterly or semi-annually via debit, credit or automatic bank draft.
8. You would like to save on your current fees whereby you are getting this service for ***essentially no cost***.
9. You would like to be able to ***try it out for no obligation*** without disclosing any account numbers.

BRONZE PLAN

For accounts *advised on* between $25,000 and $100,000. Retirement plans **do not count** towards accounts advised on.

$300 per quarter.
Includes 24/7 Financial Plan.
All Your Accounts in One Place.

SILVER PLAN

For accounts *advised on* between $100,001 and $200,000. Retirement plans **do not count** towards accounts advised on.

$450 per quarter.
Includes 24/7 Financial Plan.
All Your Accounts in One Place

*See website for all services available for larger accounts advised on.

Try it Out for No Obligation at http://bit.ly/2u5w4ZZ

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