A TEN SECOND TEST

*Please take the next ten seconds to complete this survey regarding your financial future…*

*You might rediscover some opportunities for financial growth*

\_\_\_\_ Are you working with an Advisor who has not met the rigorous educational and ethical requirements to be a boar certified financial planner™, CFP®

\_\_\_\_\_ Would you like to reduce your quarterly estimated tax payments?

\_\_\_\_\_ Would you like to see your grandchildren go to college?

\_\_\_\_\_ Are you concerned about going into a nursing home?

\_\_\_\_\_ Would you like to earn more competitive return on your investment?

\_\_\_\_\_ Are you concerned about the stock market going down?

\_\_\_\_\_ Would you like to find out how to take money out of your IRA tax-free?

\_\_\_\_\_ Is your house still titled as joint tenancy?

\_\_\_\_\_ Are you concerned about which option to make regarding your minimum distribution requirements from your IRA at age 72?

\_\_\_\_\_ Do you want to get more information on the Inherited IRA that can possibly continue your IRA for 30, 40, 50 years or longer even after you pass away?

\_\_\_\_\_ Are you concerned about the possibility that the government can get over 50% of your retirement accounts after you pass away?

If you have answered “YES” to 3 or more of these questions,   
you should come in for a complimentary review!

Remember, what you *don’t* know *can* hurt you!

CALL SARAH TODAY!

727-843-0151