PROFUSION FINANCIAL GROUP
SPRING NEWSLETTER
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A RECENT SUCCESS

Recently we assisted a client that had all they needed in income from their Pensions and Social Security. However, they had a good deal of assets that needed to be protected from Taxes, Probate, Medicaid, and other issues.

We were able to put protection measures in place, while at the same time increasing the Estate Value by more than DOUBLE, using simple planning tools!

They still have access to everything they need, but protected themselves and their heirs from costly planning mistakes!

It is worth an hour to sit with us and find out more on how you can do the same!!!

IT IS WORTH AN HOUR TO REVIEW

Call now to schedule your no cost appointment for review!!! The first 10 to schedule per month and complete the review of plan solutions will be rewarded with a $25 Gift Card to one of your Favorite Restaurants!!!

"The worst time to expose assets to the risk of the Market is 5 years before Retirement and while in Retirement. The consequences can be devastating"

Is there a way to protect what I have built and still have a chance to capture gains of the Markets?

Yes!!! Take the risk of the Market downside exposure out of the equation, and still have full uncapped potential of the Markets upside. We can review your situation and show you how it fits your plan!

Are you looking for a better alternative to the LOW CD rates being offered?

How about something that offers more protection than a CD, with better tax advantages, and much greater potential growth opportunities. Even better…with the opportunity of NO FEE!!!

Are you more in need of a PAYCHECK, or a PLAYCHECK!!!

Either decision is yours, and we can help you utilize both options. With access to hundeds of solutions, we can maximize your Paycheck with lifetime payouts at some of the highest guaranteed payout rates in the industry, or utilize the assets to plan for enjoyable retirement play!!!

Key areas of concern for many in your position:

- **#1 Concern for today's Retirees – Income Longevity (Outliving Your Income)**
- **Protection & Growth of Financial Assets**
- **Protection of Physical Assets**
- **Income during retirement, including Social Security, Pensions, 401ks and IRA**
- **Properly Utilizing Required Minimum Distributions in your Estate**
- **Rising Medical Costs and the fear of Nursing Care and its Impact to the above**
- **Wills or Trust??- The Impact it could have on Your Estate**
- **Reducing or Eliminating Tax Issues on your Assets**

Current Issues in the News:

- Effects of Proposed Tax Law Changes
- Effects of Proposed Healthcare Changes
- Effects of Proposed Changes to Retirement Funds

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Contact Us Today!!!

PROFUSION FINANCIAL GROUP

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IT IS WORTH AN HOUR TO REVIEW

The holidays are over, and tax time is over… so what better time than now to take an hour to sit down with us to review ways to improve your Retirement and Estate plans. Did you know most people spend more time planning their vacations than they do reviewing and protecting all they have spent so long to build! Contact us for a no cost consultation and review. **SEE MORE INSIDE**

In addition, we will provide a free guide to:

- Managing Your Financial Life
- Retirement and Social Security
- Retirement and Medicare
- Planning your Estate

Let's get together for an hour!!!

Additionally, if you know someone that is nearing or in Retirement…Refer them to us for a FREE Consultation & Review, and get put into a monthly drawing for a $100 Visa Gift Card.*

****Contact us with their information and tell them to call us to set up a no cost appointment for review!!! Drawing held Monthly on the First Monday of the month by a random computer generator.

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