

PROFUSION FINANCIAL GROUP

WINTER NEWSLETTER

Volume 1/2018 Issue



PROTECT SUCCESS

How much has your portfolio grown in the past 8 years? Did you know we are in the middle of the 2nd longest historical Bull run in the market? Have you considered a way to protect what you have grown and not worry about the what if it ends...?

A look back at the Great Recession, and how it impacted many soon to be, or already retired individuals...The total Market drop was impacted over 50%!!! Think about how that would impact your retirement income!!!

For many of our clients that had protection strategies, while the market plunged, they didn't have to break a sweat. Their assets were protected from the down markets, and as soon as the markets started bouncing back, their accounts picked up where the drop began!!! Not only did they not lose, they didn't have to make up for loss!!! The power of ZERO loss!!! We can show you how to do the same!!!



“An Investment in Knowledge Pays the Best Interest” – Benjamin Franklin

Is there a way to take income and still have the ability to grow the principal and not worry about outliving your money?

Yes!!! Find out how to have the ability to grow your principal at a rate greater than you are taking for your annual income!!! As a bonus, not exposed to the market losses!!

CD Rates are climbing, but is there a way to make it work harder for you! Do you know the Triple Compounding Effect???

Find out how to use a tool, similar to a CD, that offers more protection, with better tax advantages, and greater growth opportunities. AND...if you want something that has the safety of a CD with MORE opportunity for Growth with no fees...we can show you an option!!!

Are you planning for the proper protection on your estate?

Every year that goes by is time wasted on putting the proper planing strategies in place to protect your estate! With every situation different, we sitt down, analyze and provide solution strategies to best protect your estate. Take the time now, so that you don't PAY for your mistakes later!!!

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 New Tax Law Changes
- Effects of Proposed Healthcare Changes
- Effects of New Changes to Retirement Funds
- How long will the 2nd longest Bull run last, and how to protect the growth

IT IS WORTH AN HOUR TO INVEST IN KNOWLEDGE

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!!!

Call, e-Mail, Text or go to Our Website to contact us!!!



“Never put off till tomorrow what can be done today!” – Thomas Jefferson

The holidays are over, and we are in a new year ... 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**

Go to our website and subscribe for e-Newsletters

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Contact Us Today!!!



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In addition, we will provide a free guide to:

- 10 Tips to a Successful Retirement
- 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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