

Who do you know that needs to see me?

Who do you know that:

- Is building a new house
- Is selling their house
- Has a 15 year mortgage
- Is prepaying extra principal on their current mortgage
- Is thinking about refinancing
- Is putting more than the match in their Qualified Plan
- Hates paying taxes on their 1099 income
- Thinks taxes are going up
- Pays cash for their house or cars
- Has kids they want to send to college
- Puts more than the company match in their 401k
- Is a business owner
- Is worried about being able to retire
- Is 70 and does not want to take the RMD withdrawal
- Needs to get started saving for their future
- Is 62 or older that needs extra cash flow to live
- Is saving their social security check each month
- Would like to reduce financial stress in their life
- Has grand-children they would like to help with college
- Wants to know the rate of return they have to earn to be able to retire
- Wants to know how much they should be saving for retirement
- Wants to know how long they will have to work
- Are scared about having to cut back on lifestyle during retirement