



Are You A "Basement" Thinker?

*Too often, we tend to focus on individual stocks and other investments that will hopefully lead to wealth. While that is O.K., it isn't enough. The issue is investing without a sound "plan" is the same as building a house without a "blueprint." **Yes, you will get something, but it probably won't be the result you set out to get.***

Be A Rooftop Thinker!

By starting with a proper plan you take into account all assets, liabilities and sources of income. From there it becomes much easier to focus on the investments **YOU NEED** to meet your financial goals.

Work from rooftop to basement for financial success!

Investment Manager, Lance Roberts and Certified Financial Planner, Richard Rosso we'll help you

understand:

1. ***How proper Social Security and Medicare strategies*** can boost retirement income,
2. Our concept of ***financial life benchmarking*** which is there to help you become more self aware of your financial goals, wants and needs,
3. How ***using the wrong, or enthusiastic investment returns*** can place your retirement in jeopardy,
4. When ***housing decisions in retirement*** can affect your quality of life, and;
5. The ***art of talking about your gifting*** and estate intentions with loved ones.

This 30-minute webinar can keep you from making costly investment mistakes and help bring clarity to your future financial plan.

If you would like to access this recorded webinar please [click here](#).