

Do you really *understand* your  
investments and retirement plans?



If you don't understand your retirement plans how can you feel confident about them? Knowing what your invested in and how it works is just as important.

**BRASS RING**  
wealth management

# Simple.

Investing is simple, all you need is google and a checkbook,... right?

Retirement planning is complex. The markets, the myriad of investment options, tax considerations, and misinformation can all contribute to your uncertainty.

Knowing when to use asset managers over mutual funds, or annuities vs. ETF's might be Greek to you, rest assured we translate well.

Being able to identify and compare the options gives our clients an advantage.

They don't recite algorithms or Modern Portfolio Theory, but they are confident in being able to make better decisions. After all simple is beautiful, simple is effective, simple is easy.

Some would say it's a piece of cake.

We provide:

- ✓ Investment Selection
- ✓ Insurance Protection
- ✓ Portfolio Management and Guidance
- ✓ Group Financial Education and Consulting
- ✓ Retirement, Income, College, Nursing Home, and Estate Planning



## Simple | Effective | Convenient

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