



Strategic Advisor Newsletter

DECEMBER 2009

CALL (610) 404-3014 WITH QUESTIONS AND/OR TO SCHEDULE APPOINTMENTS



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December is upon us and we wanted to provide you with a few end of the year updates. First, we will be taking a family vacation during the first full week of January. Kelly will be taking / returning calls during that time. Please try to time service requests as much as possible to occur either prior to or after that week. We have arranged for any urgent needs to be met during that time.

Next, congratulations to our client referral winners this year. Even though there was not a November event this year we still had our annual drawing to honor and thank all of you who have referred friends and / or family to us. Those winning \$100 gift cards to any establishment of their choice were:

Neal and Shirley B.,
Mary Lou and Dennis C. and
Barry and Marlene K.

Again, a very special "thank you" to all who have been so kind as to recommend our services. Words cannot adequately express how important this is to us and how much we appreciate it! We would ask that you please remember us when speaking to friends. National surveys show that a vast percentage of individuals are unhappy with the financial advice they are receiving. Surveys further show that a majority of individuals say they plan to switch advisors but don't know who they can trust. These people would no doubt appreciate an introduction from you.

I'm sure you will remember that we have been talking about how you may be able to reduce the amount of needless tax on future IRA distributions. I have been working with many of you regarding this subject and as a member of "Ed Slott's Elite IRA Advisor Group" have developed some very helpful strategies to accomplish this. If we have not yet talked to you and you would like to discuss this further, please do not hesitate to call the office. I will be happy to discuss your options.

Finally, we want to take this opportunity to thank each and every one of you, our clients. We have been blessed by the many wonderful relationships that we believe have defined our business. As always, we appreciate the trust you have placed in us and want you to know that we take that trust very seriously. We value your business but most of all your friendship. At this time of year we want to wish all of you a very Merry Christmas and the happiest of New Years. It is our desire that God will bless each of you and your families.