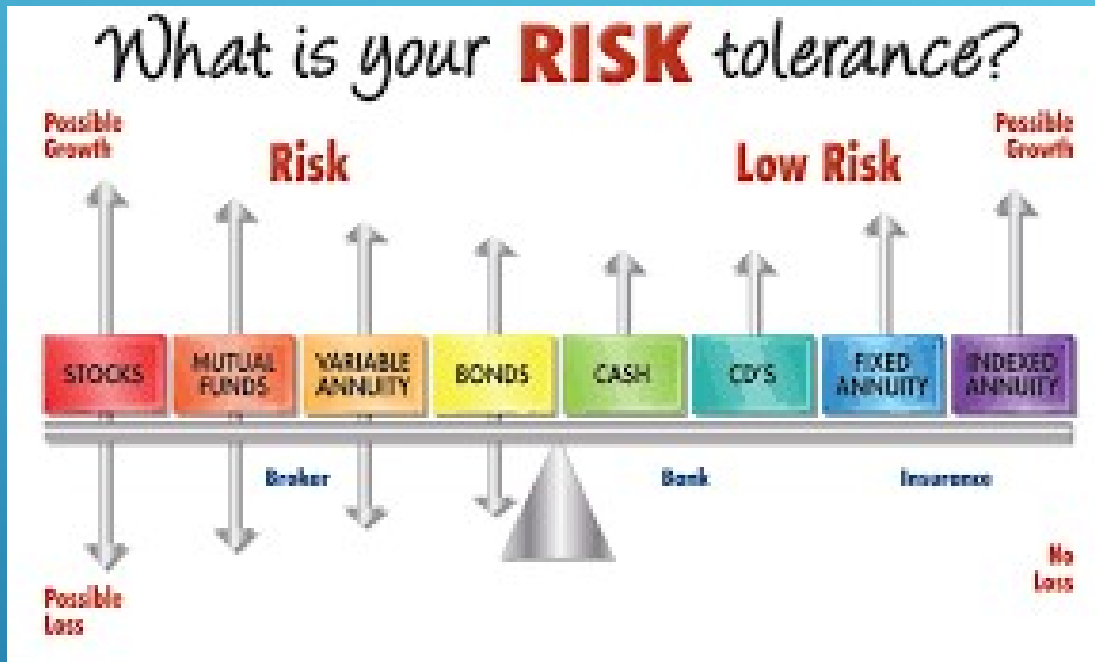




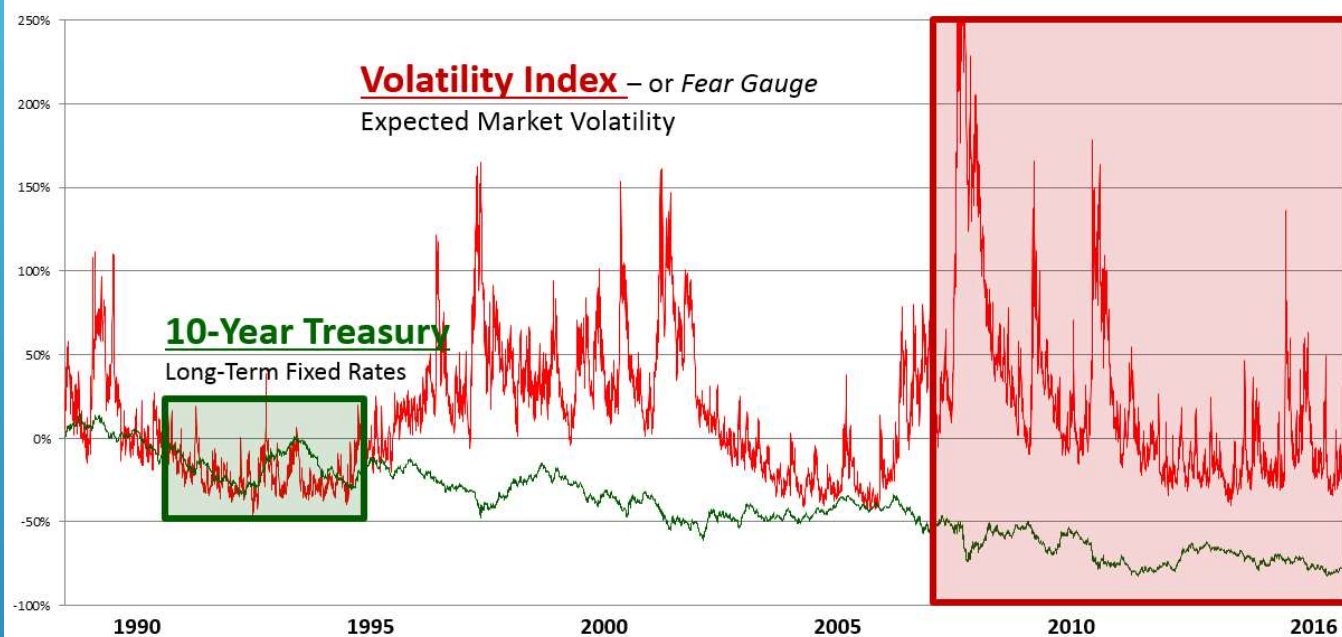
Welcome to the
Risk Analysis Class

RISK ANALYSIS



ANALYZING YOUR RISK TOLERANCE

“I hope so...” or “I know so...”



“I Know So” Money

Safer Instruments
Checking – Savings –
CDs
Treasuries
Fixed Annuities
Money Market

“Green Money” is safer.
This is money that you
KNOW will be there.
There is always a minimum
guarantee.

“I Hope So” Money

At-Risk Instruments
Stocks - Bonds
Variable Annuities
Mutual Funds
REITs

“Red Money” is at risk.
This is money that you **HOPE**
will be there.
It can go up and down, and
does not have a minimum
guarantee.

Managed Money

is professionally
managed.

Yellow Money
May be the same financial
instruments as Red Money,
but has the benefit of
professional management.

Source – Yahoo Finance – 1-11-2017

VIX is a trademarked ticker symbol for the Chicago Board Options Exchange Market Volatility Index, a popular measure of the implied volatility of S&P 500 index options. Often referred to as the fear index or the fear gauge, it represents one measure of the market's expectation of stock market volatility over the next 30 day period. (www.investopedia.com/terms/v/vix.asp) The CBOE 10-Year Treasury Note (TNX) is based on 10 times the yield-to-maturity on the most recently auctioned 10-year Treasury note. This chart is for illustrative purposes and not intended to be representative of any specific investment vehicle. Past performance is not indicative of future results.

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ANALYZING YOUR RISK TOLERANCE

It's all about
YOU:

Goals

Life Stage

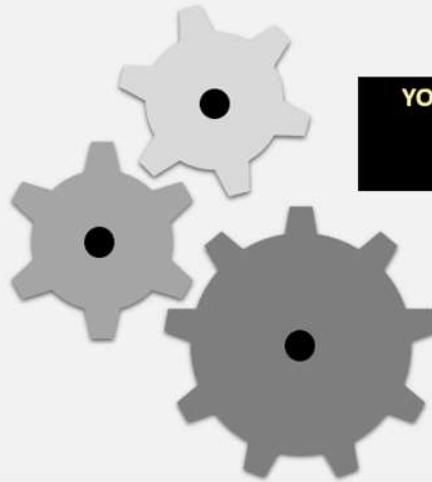
Current Situation

Investment
Experience

Planned Income

Attitudes & Values

COLOR OF MONEY RISK ANALYSIS



YOUR GOAL SCORE

33



COLOR OF MONEY REPORT

YOUR CURRENT SCORE

YOUR GOAL SCORE

GREEN MONEY

RED MONEY

YELLOW MONEY

**Money
Question**

If you lost 50 percent in your retirement account, what percentage would you have to gain to recover the losses?

THE COLOR OF MONEY: FINAL RESULT

YOUR

- Goals
- Attitudes
- Experience
- Situation

COLOR OF MONEY RISK ANALYSIS

YOUR SCORE

33

65,
will
ars:

- Your assets will be organized
- You will have a better understanding of the risk in your retirement
- Your assets will be aligned with your goals
- You will be well-equipped to manage your income plan

YELLOW MONEY



RED MONEY



GREEN MONEY



27166-RIA 2017-03-14



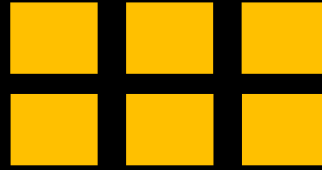
BEGIN YOUR JOURNEY

Get your Free Color of Money Score

GREEN MONEY



YELLOW MONEY



RED MONEY



Generational Vault Services



Online account information
Daily account updates
Account tracking and alerts
Advanced reports and analysis
Online document storage
Retirement education



GIB-702297-RIA 2017-07-17

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FINANCIAL GROUP**

Don't let your dreams become regrets

THE BEST NEXT STEP

For our video
today,
we would like to
offer you a
complimentary

SECOND OPINION
STRATEGY SESSION



You cannot get a second opinion
from the person who gave you the first one!

Our commitment to you ...

Our work together will be based on your needs and your values.

We will hold your information in the strictest confidence.

We build financial futures because of what we do and
create relationships because of who we are.

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THANK YOU

Thank you for attending our “Risk Analysis” class. This could be one of the most important steps to secure your retirement and create a financial structure to stand the test of time!

Your next step is to schedule a complimentary consultation. Our first meeting is to simply gather information and review your financial situation and concerns about your income plan and Social Security. Our goal is to examine the key aspects of retirement and provide you with a financial plan to stand the test of time.

Please bring the following information with you to our first meeting:

- Social Security statement
- All insurance policies and investment statements
- Last year’s tax return

All information is kept **STRICTLY CONFIDENTIAL**. After our first meeting, we will prepare a personalized summary with recommendations based on your unique goals.

I look forward to forming a long-term relationship based on trust and mutual respect.

DISCLAIMER

This is general information made available to the public. It is not intended to provide specific advice or to take the place of a personal consultation. This information should be considered only as one of many resources to assist in developing a retirement plan. It is the sole responsibility of the reader to conduct his or her own due diligence before taking action.

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