BRIAN DVORAK, Certified Financial Fiduciary®

Investment Advisor Representative

I firmly believe my clients are my greatest assets. I put you first, focusing on your financial well being and coordinating all your retirement benefits.

Dvorak
WEALTH MANAGEMENT

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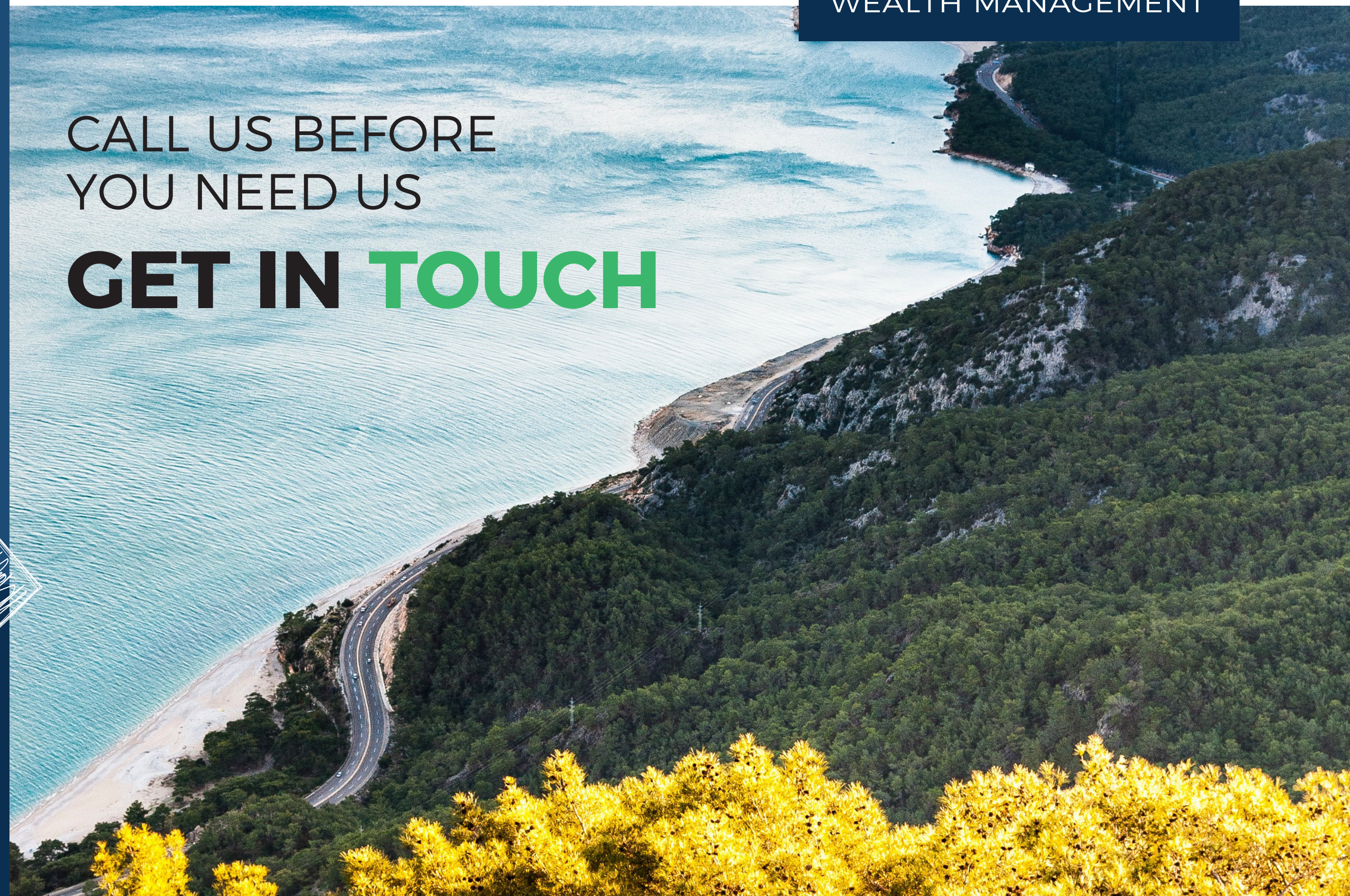

CALL US BEFORE
YOU NEED US

GET IN TOUCH

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SAFE SOLUTIONS FOR

RETIREMENT

We Can Help Paint Your Financial Picture
Claiming Your Social Security Benefits
Protecting and Preserving Your Assets

OUR INCREDIBLE

GUARANTEED INCOME

Many of our Products Guarantee an Income Stream You Can't Outlive

CAN YOU AFFORD TO RETIRE?

Using our detailed income analysis we can accurately determine when you can afford to retire and how much income you will need for retirement. Our business principals and objectives are predicated on positive performance, safety, security, and guarantees.

UNDERSTANDING YOUR INCOME

There is an IRS rule referred to as the Pre 59 1/2 Distributions (Rule 72t) that allows you to access your IRA's 401k's, 457's and other retirement accounts. Keep in mind this is something you have to be careful about. Failure to comply with Rule 72t could result in substantial IRS penalties.

If you exhaust your IRA early you may be forced to go back to work after starting retirement. This is why it is critical to know how much money and income you will need to retire and plan accordingly.

CLAIMING YOUR SOCIAL SECURITY BENEFITS

There are several little known claiming strategies that can greatly impact your social security benefits. When determining when to apply for social security benefits, it's what you don't know that could potentially cost you thousands. We provide a free social security analysis that will show you the various claiming strategies that are suitable for your retirement needs.

ABOUT US

In today's economic environment it is wise to know all of your options, allowing you to make decisions that are in your best interest. We would enjoy the opportunity to discuss your wants, needs and goals. Our hours are by appointment only Monday through Friday. Give us a call to schedule your appointment today!

RETIREMENT

INVESTMENT

We are uniquely qualified to assist in all of your conservative retirement needs.

IRA'S – TRADITIONAL, ROTH & SIMPLE

IRA ROLLOVERS

401K'S, 457-403B PLANS

TSA'S TAX SHELTERED ANNUITIES

PENSIONS

PROFIT SHARING

COLLEGE PLANNING

ROTH CONVERSIONS

DIRECT TRANSFERS

ESTATE PLANNING LEGACY