



WWG Couple Finds Confidence in their Financial Future

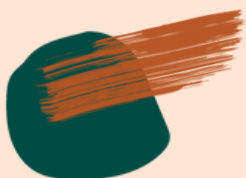


Evan and Sheila came to WWG when their previous financial advisor left the business. They did not have the time or expertise to make smart investment decisions although they certainly had the desire. They shared a common concern about retirement and not overpaying taxes. They have two

children that are involved in a lot of activities, Sheila is a marketing executive, and Evan does consulting which keeps him busy during those engagements.

Since working with WWG, Sheila has been with 4 employers and must juggle the various benefits and retirement plans that have been offered. Evan is self-employed so needs to build his own benefits package which includes 401(k), life insurance, and disability. They are concerned they don't have the time or expertise to figure this out themselves.

Evan and Sheila worked with WWG to make financial planning a priority together, bring clarity & organization to their money, and align their financial decisions with their big goals. WWG was able to assume management of all retirement accounts, and college saving accounts and provide proactive advice on Sheila's 401(k) plan that is not under their management. By creating a trust for their assets, Evan and Sheila have established a way to grow many of their assets tax-deferred and tax-free. By defining their goals and priorities, they have reallocated some of their cash to protection with insurance and investments with higher return potential. They have confidence in their plan to retire at age 60 with a solid margin of error.



Whitney Emanuel

Whitney Wealth Group

Founder, CEO | Financial Planner | CFP® | CRPC®

phone 612-296-6939

whitney@whitneywealthgroup.com

www.whitneywealthgroup.com

Client's name has been changed to protect their privacy.

Securities offered through Securities America, Inc Member FINRA/SIPC. Advisory services offered through USAAdvisors Wealth Management, LLC. Whitney Wealth Group, USAAdvisors Wealth Management, LLC and Securities America are separate entities.