



September 13, 2018

“Daddy, are you a fireman or a policeman?”
As soon as I got home Tuesday night, I was greeted by that question from my 5-year old daughter.

During her school's Patriot's Day assembly, students' fathers (police/fire) received some well-deserved recognition. I believe she came home wondering if I'm some kind of hero too.

“No sweetheart, daddy is not a policeman or fireman.” “Well, WHAT are you?” “I am a businessman.” With the most confused look ever, **“What is THAT?”** I laughed out loud, thinking, how am I going to explain my business to her? How could I make it as simple as possible so that she could get it and be satisfied? **“Daddy helps people be very smart with their money so they don't have to worry anymore.”**

It worked! She got it. Surely, she was disappointed that I'm not a hero in a uniform. But at least understands the purpose of my work. As she returned to playing, I thought of all the times I've heard the advice, **“Make your 'value proposition' so simple that even a 5-year old could understand it.”** Somehow I never imagined it would actually be for the purpose of sharing it to my own inquisitive 5-year old!

Here are 5 simple ways we can reduce financial stress for you:

1. Give you a clear and detailed plan for a successful retirement.
2. Find ways to reduce your tax liability.
3. Reduce your costs on existing insurance or investments.
4. Stress test your financial plan and portfolio for a bear market recession.
5. Diversify your sources of passive income.

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