

Time-Sensitive Investment Opportunity



April 2nd, 2023

Hello,

This newsletter's different than any I've sent before because it's focused on one specific investment opportunity with some time urgency behind it. This probably does NOT apply to most of you, but if you're closer to my age, it might be appropriate for your parents. In my opinion, it's worth a look only if you're between 55-79 years old.

I'm younger so I passed on it, but my parents fit that 55-79 bracket so they took advantage of it with a portion of their retirement investments. Josh, our Director of Financial Planning at [PACIFIC CAPITAL](#) also helped his parents invest in this opportunity. We both have conviction in this enough to invest our own parents' money in it.

A few key benefits:

1. earn compounding interest and growth
2. no chance for your investments to lose value
3. the growth and interest you earn is tax-deferred
4. you can elect to take a steady and predictable income payment at any time

While those types of investment benefits are not uncommon, there are 3 reasons this opportunity is compelling and time sensitive:

1. one of the top companies we work with is offering a 32% credit to new deposits (i.e. deposit \$400,000 and you are immediately credited \$128,000 on top of your investment)
2. interest rates are very high today, so the offers and rates are the best we've seen in decades
3. **The offer expires tomorrow (April 3rd)**

You don't have to invest money or deposit funds tomorrow, but you do have to reserve your spot if you want the 32% bonus. You'll then have 60 days to fund your investment. If 60 days isn't long enough, you can make a smaller deposit (i.e. \$50k) tomorrow (Monday, April 3rd), and then you have 18 months to add whatever amount you'd like and still receive the 32% bonus. I'm getting into the weeds a bit but wanted to get this out there in case you or your parents, or someone you know, might be interested since it's time sensitive.

Disclaimer: This is NOT a specific investment recommendation to you personally. There are tens of thousands of you who might read this. So it's just a general announcement of an opportunity. If you're not between 55-79, I don't think it makes sense. If you have questions, reach out to our team (ask for Josh) tomorrow between 8 am and 3 pm to discuss it for yourself or a family member and we can determine together if it makes sense.

Email josh@pacificcapital.com or call us 844-777-8777.

Our goal is to help you enjoy increased lifestyle and financial freedom by removing your stress about money, increasing your cash flow, and freeing up a ton of your time.

Sincerely,



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