

CLIENT GOALS

January 1, 2010

My client's goals are to achieve greater long-term net worth with less risk getting there and with little or no sacrifice in lifestyle getting there.

- 1) They want to enjoy streams of income for a worry-free retirement.
- 2) They want to efficiently move assets to the next generation or charity without losing control of their income.
- 3) They want to protect their assets from predators or the financial problems of long-term illness or disability.

Give us a call to discuss your goals with us.

330.893.2600

Ask for Pleasant Wealth Associates.



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**PLEASANT FINANCIAL
CONVERSATIONS**