A COMPLIMENTARY RETIREMENT PLANNING EDUCATION PROGRAM FOR YOU

Money Coach

Pursue Your Goals
Maintain Confidence
Balance Risk, Rewards

You have goals, dreams, and a vision for how you want to live in retirement, all of which require exceptional money management. Breathe easy. Oswald's money coaches are on your team.

ACHIEVING FINANCIAL FREEDOM

We focus on retirement readiness, and we tailor our strategy to meet your needs. Our money coaches sit down with you one-on-one to get the full picture of your situation and goals, so we can guide you through every stage of life's journey.

We deliver education that makes a difference, and in a way that is convenient for you. We offer in-person seminars, pre-recorded and live webinars, as well as engaging, animated videos and guides. Our goal is to alleviate the pressure and intimidation of money management by making the process easy.

OUR SERVICES

Our team offers a range of planning resources and services to help you reach your goals:

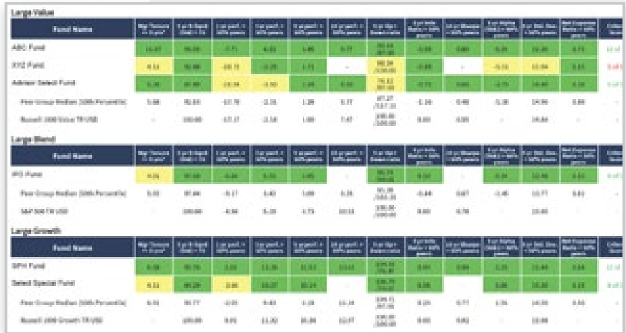
- Comprehensive portfolio management
- Ongoing investment monitoring
- Periodic reviews
- Financial planning
- Wealth management
- Income distribution
- Retirement planning
- Investment strategies

Coordination with other professionals:

- Insurance solutions
- Estate planning
- Cash-flow & tax planning

Using our strict 12-point scoring methodology, we consistently monitor the portfolios we manage.

We can create a comprehensive side-by-side analysis of your current portfolio versus our other managed portfolios. This analysis takes into account asset-weighted returns for year-to-date, and over one, five, and ten-year periods. We detail risk metrics and the upsides and downsides of the portfolio.



Communication is Key

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We meet regularly with individuals like you to review their plans, and we provide ongoing education opportunities and informative client communications that include timely tips to manage their portfolio. Have a question or concern? Contact our participant hotline any time.

"This is the kind of information I wish I had during the 2022 meltdown. My losses last year were very troubling and worrisome, but this presentation put things in a better perspective for me. I truly appreciate Oswald putting this together in a very simple and understandable way."

"(Oswald's Money Coach) was already up to speed and saved me time. Second, he addressed all the high-level questions that I had. He shared that further consultation would cost me nothing and that they are a fiduciary. What an amazing benefit that was presented at the perfect time!"

"I have tried for several months to deal with the funds in (my deferred compensation plan) and set my allocation and distribution. The plan administrator has been zero help. (My Oswald Money Coach) was not responsible for the plan administration, but he helped work through the issues that I had. Without his help, I would still be wandering in the wilderness."

Contact us

and let our money coaches help YOU make the right plays to live life the way you want. We'll give you the financial confidence to say; "Put me in, Coach!"

OswaldFinancial.com/MoneyCoach ›

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