

# How To Gain Financial Freedom In Today's Uncertain Economy With A No-Obligation Second Opinion Review Of Your Portfolio

Are you disappointed with the performance of your investments over recent years?

Are you concerned that your portfolio is not prepared to handle turmoil in the markets and global economy?

Our experience in the 2000-2002 bear market and the 2008-2009 market crisis showed us that you are likely to fall into one of two camps: you do nothing different with your investments and hope to ride this out, or you make radical changes in your portfolio to try to "time" the next market move.

**BOTH CHOICES COULD NEGATIVELY IMPACT YOUR NEST EGG, YOUR RETIREMENT PLAN AND LIFESTYLE IN YOUR LATER YEARS, AND PERHAPS EVEN YOUR OWN AND YOUR FAMILY'S FINANCIAL FUTURE.**

If you are concerned that your investments are going in the wrong direction or you are experiencing a life change or major financial event – or if you simply want a fresh, independent perspective – you deserve to know how your investments are positioned and whether your current wealth management plan shows that you are on track to achieve your long-term goals.

Too often, higher net worth individuals and families are not properly diversified. The outcome? They fail to preserve their assets. Or they make one of 5 common, but in our opinion entirely avoidable, mistakes, and they are not happy with the results they see from their investments.

## **YOUR UP-TO-DATE, COMPREHENSIVE REVIEW OF YOUR PORTFOLIO**

The independent advisors of Abel Financial Services of Baton Rouge, LA offer a No-Obligation, Second Opinion Review of Your Investment Portfolio. This



**LEO ABEL**  
President, Abel Financial Services

You'll be able to see visually what you own today and recognize your portfolio's strengths and weaknesses.

review provides a comprehensive analysis to qualified individuals at no charge.

Through our industry-leading "Financial Goals and Values Questionnaires" we first understand what is most important to you, how you would like your money to behave, and the growth and income you may need from your portfolio. This Review will benchmark your portfolio against situations similar to yours so you understand exactly how you stack-up. In addition, the review assists you in understanding what you own now and why, provides recommendations to improve your current portfolio, and identifies areas of risk in your wealth management plan.

## **HOW TO AVOID COSTLY MISTAKES, PRESERVE YOUR INVESTMENT ASSETS, AND BETTER POSITION YOUR PORTFOLIO FOR THE FUTURE**

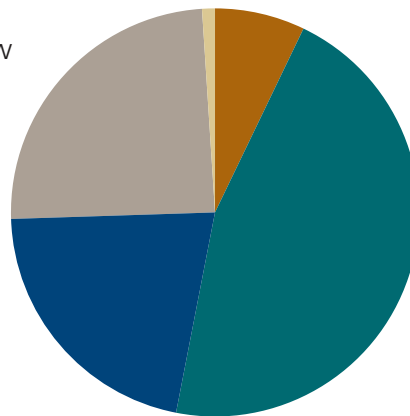
What can you gain from the Abel Financial Services Second Opinion Review? It is designed to enable you to:

1. **Achieve Clarity on What Your Portfolio Needs to Do for You and Whether You Are On Track** – Simply complete a 10-question Financial Goals and 10-question Values Questionnaire to achieve greater understanding of your needs and desires as an investor and where you stand relative to your goals and aspirations.
2. **Review and Benchmark Your Portfolio so that You Know How It Stacks Up** – Through our sophisticated financial planning and investment modeling software, we'll analyze and review your current portfolio. You'll be able to see visually what you own today and recognize your portfolio's strengths and weaknesses. And we'll compare it with our recommended portfolio for your situation.

3. **Receive Specific Action Steps for Preserving and Investing Assets Today** – What is most valuable to many investors is how we collaborate with you to interpret the data, prioritize the recommendations, and produce a set of clear, defined, and prioritized action steps. These encompass wealth management planning and investing with the goal of preserving and managing your portfolio over time.

*From the initial information that we analyze you will receive:*

- A Detailed Understanding of Goals and how you would like your money to behave,
- Investment Ratios measuring financial performance, diversification, and risk,
- Growth and Income Needs and how your portfolio measures up against them,
- A Client Profile, so that you know what kind of investor you are, and
- Recommendations, including actual changes in investment strategy and tactics.



Asset Allocation	Portfolio Net %	Bmark Net %
Cash	7.54	2.66
US Stocks	45.47	64.89
Non-US Stocks	21.23	0.11
Bonds	24.21	32.31
Other/Not Classified	1.56	0.03
<b>Total</b>	<b>100.00</b>	<b>100.00</b>

**IT COMES DOWN TO THIS: A SECOND OPINION REVIEW IS VITAL FOR MANY REASONS SUCH AS . . .**

- An independent portfolio review can help you understand where you stand today and whether you are well positioned to reach your goals in the future,
- In comparing your portfolio to similar situations, the Review identifies opportunities for better diversification, investment strategy improvements, wealth management planning, and for tactical changes, and
- A fresh, independent perspective can help you identify the unique risks and opportunities within your situation and, also, gain confidence in your plan.

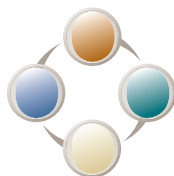
**DON'T WAIT – GET STARTED ON YOUR SECOND OPINION REVIEW TODAY**

**To get all the details, to make sure you qualify, and to start your Second Opinion Review with Leo Abel today, call him directly at (225) 408-4000 or send an email to [Leo.Abel@RaymondJames.com](mailto:Leo.Abel@RaymondJames.com).**

**ABOUT ABEL FINANCIAL SERVICES**

**WEALTH MANAGEMENT IN THE BEST INTEREST OF OUR CLIENTS**

Our “client first” tradition at Abel Financial Services is simple: Our professionals always act in the best interest of our clients. As independent financial advisors, our advice is objective and unbiased. There are no proprietary arrangements to sway our focus from our clients’ dreams and desires.



**Leo Abel, CFP®**  
**Abel Financial Services, Inc.**  
 An Independent Firm

9270 Siegen Lane, Suite 301 • Baton Rouge, LA 70810  
 T: 225-408-4000 • TF: 800-769-9619 • Fax: 225-408-8599  
[Leo.Abel@RaymondJames.com](mailto:Leo.Abel@RaymondJames.com) • [www.abelwealthmanagement.com](http://www.abelwealthmanagement.com)  
 Securities offered through Raymond James Financial Services, Inc. Member FINRA/SIPC