Copy Excerpt from General Marketing Booklet

HEADING: Competence and Caring: The CSA Difference

As a senior, you're confronted with a dizzying array of choices. How will you maximize what you've saved for retirement? What are the best strategies for minimizing your taxes and keeping more of your hard-earned money? How do you plan for long-term care and final expenses? And what about those you leave behind?

Where can you get all the right answers?

Coming up with a comprehensive strategy for dealing with this stage of your life can seem like an impossible task. Decisions you make now will have lasting impact, not only on you but also on those you love.

If you're like most people, you're piecing together advice from a lot of different sources, trying to make everything fit. But you wonder: Is there a better way?

There is.

At Sample Financial Group, we specialize in bringing together qualified professionals from many different areas – CPAs, attorneys, and others – to formulate an individual, coordinated game plan to meet each client's challenges. So you won't get a "one size fits all" solution. And you won't be pressured to accept something that doesn't meet your needs.

And since this team is headed by John Q. Sample, a Certified Senior Advisor, you'll know that the advice you receive is focused, first and foremost, on your unique needs as a senior.

Because at this stage of your life, you not only need someone who's competent – you need someone who understands your needs and cares about you and your family.

Subhead: What Is A Certified Senior Advisor (CSA)?

Certified Senior Advisors (CSA) are individuals who undergo rigorous training in 16 areas of special concern to seniors, such as estate planning, Social Security, long-term care, and end-of-life planning. After successfully completing these courses, these advisors are certified by the Society of Certified Senior Advisors (SCSA), an educational organization founded in 1996 by a group of forward-thinking geriatric MDs, gerontologists, elder law attorneys, CPAs, financial planners and other qualified professionals.

The CSA designation is awarded to individuals in many different professions, such as accountants, attorneys, home health care professionals, and financial planners. With this training, CSAs in these professions are fully equipped to help seniors and their families deal with the issues facing them at this critical time of life.

CSAs are bound by a strict Code of Professional Responsibility that dictates adherence to principles such as competence, confidentiality, professionalism, fairness, integrity, and diligence. This emphasis on ethical and professionally responsible conduct is your assurance that the person bearing this designation is not only fully trained but also sensitive to the needs and concerns of seniors.

Heading: Solutions Designed Just for You

With all the things you're faced with, you need someone who has access to a wide variety of solutions to meet your needs. Unlike many other financial services providers, Sample Financial Group is licensed to offer products from many different companies, most of them A-rated or better. So you have more to choose from. That means a better fit for your one-of-a-kind life.

And Sample Financial Group's team goes beyond offering top-rated insurance and financial products to advise you on issues such as income tax strategies, Medicare/Medicaid coverage, long-term care, and estate planning. We're always focused on the total picture.