



Massow  
Wealth  
Strategies Inc.  
An Independent Firm

**Jay R. Massow CFP®**  
**CERTIFIED FINANCIAL PLANNER™**

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## **Second Opinion Service (S.O.S)**

At Massow Wealth Strategies, Inc., over the 22 years we have been serving clients, we've met many individuals and families who are concerned about their financial future. Given ongoing uncertainty in the economy and the growing challenge of accomplishing individual goals, nearly 90% of affluent investors welcome a second opinion on their families' finances.\* 2010 Matt Oechsli Report.

### **Financial health is like your physical health.**

If you take good care of it, you're more likely to have a healthy future. Even when you get regular advice from an experienced professional, whether a doctor or financial advisor, you sometimes can benefit from a second opinion. In today's uncertain economy, a fresh perspective from Massow Wealth Strategies could be exactly the second opinion you seek.

### **By simply by just giving us a call or emailing us, we will set up an appointment for you to come in and discuss your situation.**

We'll ask you to briefly outline your financial goals to help us gain clarity on what your investment portfolio is intended to do for you. Then, we will evaluate your individual situation, your individual investments and respond with plain English recommendations based on YOUR situation and what you want to achieve.

If we think your investments and current financial game plan are well suited to your long-term goals, despite all the market turmoil, we'll gladly tell you so, and send you on your way.

If, on the other hand, we think your current investment and financial game plan no longer fits with your goals, we'll explain why, in plain English. And, if you like, we'll recommend an alternative game plan aimed at improving the probability of reaching your individual and family goals. Either way, the time is on us!

Sincerely,

**Jay Massow CFP®**

President, Massow Wealth Strategies Inc.



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### ***Your investment strategy deserves another look.***

Our Second Opinion Service (S.O.S.) helps you determine if your financial plan/investment strategy—and even your investment advisers—are working toward your unique goals.

- How diversified are your investments?
- Are you being sold product or are you getting advice?
- Who is really managing your money?
- How much are you truly paying for the advice you receive?
- How much depth does your advisory team have?
- Are you getting the face-time with your adviser that you rightfully need?

### **“Wait and see” is not an investment strategy.**

What worked for your investments six years ago—or even six months ago—may not be working for you today. Investment products change. Markets change. Your financial situation and goals change.

And your investment strategy should adapt—to your age, financial circumstances, timeline and the economic landscape.

### **We don't pull your investment strategy out of a box.**

**We believe investing is a process, not a product**, so we take the time to get to know your unique financial situation before we propose an investment solution.

What you end up with is an investment strategy customized to your financial needs and goals, not one that is pre-packaged to fit your demographic.

Want to know what kind of comprehensive financial planning and investment strategy we would map for you?

Find out how a personal **CFP®** can make a difference to your investment strategy.



Schedule a **Second Opinion**  
Consultation now

**To get started with your free, no-obligation Second Opinion you may contact us two ways:**

- Email us at [jay.massow@raymondjames.com](mailto:jay.massow@raymondjames.com) or assistant's [Joanna.garney@raymondjames.com](mailto:Joanna.garney@raymondjames.com) or [Victoria.dolinch@raymondjames.com](mailto:Victoria.dolinch@raymondjames.com)
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