

# LS Wealth Strategies LLC



## HIGHLIGHTS

### BUCKET STRATEGY®

If you're like most retirees or pre-retirees, you hunger for stability and risk avoidance, yet yearn for growth to rejuvenate your portfolio that may have been battered over the past few years.



Both Bill Saplicki and Woody Levinson are trained in the retirement income strategy known as "The Bucket Strategy" by its designer, Ray Lucia, Sr. Ray Lucia's Bucket Strategy® offers a reassuring strategy that aims to give investors both growth and inflation adjusted lifetime income.

### CONTACT JESSICA

Our administrative assistant, Jessica Scott, can be reached at [jessica@lswealthstrategies.com](mailto:jessica@lswealthstrategies.com) or at (972) 762-5135 for questions or to set up an appointment.

## 2012 Dallas Five Star Wealth Managers Announced

### Area Wealth Managers Qualify for Award Based on Research

Five Star Professional has named the Dallas area recipients of the 2012 Five Star Wealth Manager award. The award winners will appear in a special section in the August issue of *Texas Monthly*. Since 1973, *Texas Monthly* has chronicled life in contemporary Texas, reporting on vital issues such as politics, the environment, industry and education. *Texas Monthly* has a reputation for providing its readers with a magazine of the highest editorial quality.

Bill Saplicki & Woody Levinson are recipients of the 2012 Award and are in a small, select group of advisors who have received the honor for 3 years in a row!

Five Star Professional conducts research to help consumers with the important decision of selecting a wealth manager. Five Star Professional provides localized, independent research on the performance of professionals and conducts research to identify those who provide quality service to clients. The research also includes feedback from industry peers and leaders, and a regulatory review to provide necessary checks and balances. The Five Star program, now entering its seventh year, is the largest and most widely published wealth manager award program in North America.



"We work with our clients to develop and monitor a strategic wealth management plan. Our role is to assist in the creation and preservation of wealth." Bill Saplicki and Woody Levinson.

Five Star Wealth Managers do not pay a fee to be included in the research of the final list. The overall survey score reflects an average of all respondents and may not be representatives of any one client's evaluation.

### Certified Wealth Strategist®



In addition to being Five Star Wealth Managers, both Bill Saplicki and Woody Levinson have also earned the professional designation of "Certified Wealth Strategist" in an effort to better serve their clientele.

A Certified Wealth Strategist® strives to help clients:

- ◆ Create and grow wealth
- ◆ Protect and preserve their wealth
- ◆ Plan for the distribution of their wealth during life, and at death, in the most tax-advantaged way

Bill Saplicki and Woody Levinson are Registered Representatives offering securities through First Allied Securities, Inc., a Registered Broker/Dealer, Member FINRA/SIPC. Advisory services offered through First Allied Advisory Services, Inc., a Registered Investment Advisor.