

ARIZONA WEALTH GUIDE

LIFETyme FINANCIAL, LLC

Creative Problem Solving, Independent Thinking Blaze New Financial Paths



The advisors of LifeTyme Financial are leaders in their field. Members of the Million Dollar Round Table, they are called on to teach financial planning to CPAs. Angela Ashley is flanked by Mr. Pettit (left) and Mr. DelFranco (right). Both men are proud military veterans.

Sometimes, the truth is hidden in plain sight. Investors with “tunnel vision” miss opportunities to retain hard-earned assets and build wealth.

Helping clients take off their blinders is the mission of the LifeTyme Financial team in Phoenix, Arizona. Investment Advisor Representatives Vincent DelFranco, Charles Pettit, ChFC® and Angela Ashley bring fresh perspectives to retirement and tax strategies for individuals, families and small business owners.

“We believe in thinking ‘out of the box’ and we are not afraid to challenge conventional wisdom in our approach to investing and preserving wealth,” explains co-founder Vincent DelFranco. “As an independent financial firm, we’re not limited in what we can offer and not pressured by sales quotas.”

Lighting the Way for Life’s Financial Milestones

“We work best with those who are going to be fully engaged,” says co-founder Charles Pettit. “Our clients don’t go into autopilot and simply wait for quarterly statements. They are involved early on, taking part in a methodical discovery process with us. They are committed to taking the time necessary... perhaps as much as 16-20 hours ... to complete a comprehensive financial needs analysis.”

The LifeTyme team takes this process seriously. “It’s more important to get to know the clients’ needs and long-term goals than selling a product. Only then can we help them design a lifelong strategy that encompasses much more than stocks and bonds. Our holistic approach includes often overlooked alternative investments, wealth management, withdrawal tactics, tax minimization, risk management and other factors that must work together cohesively,” adds Angela Ashley, who holds her Life/Health/ Disability License, Series 65 and is a licensed Medicare Specialist.

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“As the saying goes, ‘you don’t know what you don’t know.’ We shine a light on our clients’ financial picture from every angle,” says Vincent DelFranco. “Then we carefully translate the industry jargon into easily understandable language so investors can make educated decisions moving forward.”

Broaden Your Vision and Your Options

A hallmark of the LifeTyme approach is an emphasis on efficiency without major disruptions to lifestyle. “We constantly educate and encourage investors on a wide range of topics including mortgages, business succession, divorce settlements and much more,” says Charles Pettit. “By following our advice, many of our clients have been able to mitigate unknowing and unnecessary losses, improving their future outlook.”

Recently, after a 70-year old business owner passed away, LifeTyme was able to step in to assist his children transfer the business. His existing plan was ineffective. LifeTyme developed a solid solution that allowed the business owner to leave twice as much money to his children and set aside money to pay college tuition for six grandchildren on a tax favorable basis.

“Financial planning isn’t just about portfolios. It’s a LifeTyme Financial Strategy built on trust,” says Angela Ashley. “We’re blazing financial paths for wealth that will last a LifeTyme.”



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