



MWM NEWS & VIEWS

"Think cash flow, not rate of return. You can't spend rate of return!"

March 2017

Volume 1, Issue 3

Your Team Of Financial Professionals



Mark, Brook, Brett, Steve, Tanya

Personalized and Custom Designed Strategies in:

Retirement Planning
Comprehensive Financial
Planning
Investment Management
Estate Planning
Insurance Planning
Long Term Care
Tax Planning
Wealth Management

Upcoming Client Events: March 16, 2017

*Unlocking Social Security:
Learn How to Maximize Your
Benefits*

*Guest Speaker: John Deppe
Regional Vice President with
Transamerica Capital, Inc.*

*5:30 for Drinks and Dinner at
Pinstripes, Northbrook
For more information please call
Tanya Dooley at 847-262-3032*

Brett Gardiner Joins Mappa Wealth Management

In November of 2016, Mappa Wealth Management welcomed Brett Gardiner to our team as a financial planner. Brett brings over twenty-five years of business experience and twelve years of experience in financial services to our firm. We are very pleased to have him on board.

Brett's prior position included giving educational seminars on financial products, tools and resources; he hosted almost 100 seminars each year and loves speaking and providing the knowledge people need to make informed decisions about their financial plans. We are excited that he can bring that experience to Mappa Wealth Management and create those kind of educational seminars for us and for you.

He decided to make the change to financial planning to spend more time with his family. He and his wife, Laura, are very committed to their family, their community and their church and wanted to be able to prioritize their lives in a way that made more sense. I'm sure most of us can understand that need. That commitment to service is why he chose to be a financial planner as Brett says:

"That commitment comes out of a sense of wanting to be of service in my career as well. I also am fulfilling a long-time dream of mine, to have my own business that will allow me to prioritize family life."

Brett is going to make a great contribution to our financial planning team.





All Dressed Up and Ready to Go

The Gardiner family

When Brett says family is his priority, he means it. Here he is with his wife, Laura, and their four children at a family wedding in Charleston SC. With four terrific kids, it's easy to see why he is so committed and involved with schools, church and community.



847-262-3030

E-mail: info@mappawm.com

Website: www.mappawm.com

Insurance Reviews: An Important Part of Your Financial Strategy

Insurance planning is an important part of your financial strategy and, just like any other investment strategy, it is critical that it is reviewed on a regular basis. Whether it is life insurance, long term care, disability, group health, Medicare, etc., we are here to help you. Here are some things that we will look at when we review your policy.

- Has your personal situation changed? Have you married, divorced, had children?
- Have there been any changes in your business life? Did you get a big promotion or start your own company?
- Determine whether policies are using the most current information on longevity, this could affect your costs.
- There are many types of insurance; does what you have meet your current needs?
- Are your beneficiaries correct? When did you last update them?

These are just a few of the things we will look at when we review your insurance plans. Remember, at Mappa Wealth Management, our professional partnerships and resources mean that the right specialists are in place to make sure that your insurance planning is a cohesive and congruent part of your overall financial strategy.

MWM News & Views is for You.

This newsletter is produced to keep you informed about the team at MWM and provide information on financial issues you need to know about, as well as keeping you updated on upcoming events and seminars. If there is a financial issue you want to know more about, or an idea that should be mentioned here, please let us know by contacting us at:

info@mappawm.com

We will do our best to honor your request

Our Office Locations:

2700 Patriot Blvd - Suite 250, Glenview, IL 60026

401 N Michigan Ave, Suite 1200, Chicago, IL 60611, 201 W. Springfield Ave., Suite 903, Champaign, IL 61820