



# Rosenberg Financial Group

**Retire...Relax™**

## RETIRE...RELAX™ AND WEALTH BUILDERS PORTFOLIOS

Rosenberg Financial Group has created two programs specifically designed to support people as they move through life. These portfolios are designed to assist clients in achieving the retirement of their dreams. These programs, the Wealth Builders portfolios, and our Trademarked Retire...Relax program, assist us in managing our clients' money.



The **Wealth Builders** program is designed for those who are in the accumulation phase of life. During this time of life people are starting their careers, buying homes, starting families, and working hard to achieve a successful financial future.

Our **Wealth Builder** program can support this financial phase of life. Wealth Builders utilizes a pool of high quality investments that we trust. These funds are managed by best-in-class strategists which allows us to construct your investment portfolios and conduct on-going investment strategies without having to make day-to-day investment decisions. Wealth Builder clients are contacted at least annually for a financial review.

The **Retire...Relax™** program is a disciplined approach to investment management. This program is designed for pre-retirees and retirees that includes an exit strategy when we feel risk is too high. Clients in this portfolio do not want to experience a significant portfolio loss in the event of a severe and protracted market contraction.

These portfolios are actively managed by our team of financial professionals with decades of combined knowledge and experience. We are confident in the Retire Relax portfolios and the management processes. Our clients who invest through this program are contacted periodically throughout the year for a financial review.



### **Our Core Beliefs**

*We believe* you should work with someone who represents you, not some corporation.

*We believe* you should work with a fiduciary who is obligated to put your interests first.

*We believe* the people you are working with should disclose their conflicts of interest.

*We believe* that financial or estate planning should be accomplished by a Certified Financial Planner™ Professional.

## OUR WEALTH BUILDERS AND RETIRE...RELAX™ PORTFOLIOS HAVE YOU COVERED.

Here are some great ways to learn and grow financially:

- 1) Our website is [www.retirerelax.com](http://www.retirerelax.com). This site contains many Special Reports that are absolutely free. Reports cover topics from, “Can I Afford to Retire?,” to “Maximizing Social Security Benefits.” This is a great way to begin to better understand your finances and retirement.
- 2) “Your Money”, is a live, call-in radio show we host every Saturday morning from 9-10 am on Newstalk 940 WMAC. Recordings of this show are available on our website. Rosenberg Financial Group has been broadcasting this program for over 30 years.
- 3) If you watch Channel 13 WMAZ, you will see one of our Financial Advisors, Sherri Goss, President of RFG, sharing educational financial segments with viewers. Sherri has been providing these educational segments since 2007.
- 4) “My Life Book” is a free estate-planning guide that will help you get organized. Written in 2007 and updated annually. This workbook explains the importance of wills, powers of attorney, and advance directives, it also helps you organize your financial life for your Executor.
- 5) Financial Plans are an excellent method to help guide you on your path to financial freedom and security. Check out the free resources on the Planning tab of our website. They will provide the necessary resources to build a plan customized to your needs. This tab also contains information on creating a budget and paying off debt.



A cornerstone of our business is giving back to the Middle Georgia community through offering educational seminars to explain the markets and economy, provide general financial and estate planning tips, and other topics that impact you on your journey throughout life and retirement. If you are a member of a church, civic organization, or club and need a guest speaker, consider us. We do not charge for this service and consider it an honor to have a positive financial impact on the people we reach through this service.

Office locations: 2517 Moody Road in Warner Robins and 4875 Riverside Drive in Macon

(478) 922-8100 or (478) 741-4457 ~ [www.retirerelax.com](http://www.retirerelax.com)

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