

Kessler Investments Quarterly

Kessler Investments, Inc.

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The Kessler Team has grown

We are happy to introduce our newest team members

Anita Bevis joined our team last August. She might seem like a familiar face to anyone who is a member of the Athol YMCA. Anita previously worked the front desk at the YMCA before moving on to being a Caretaker for her father. She is now the Director of First Impressions here at Kessler Investments. She is the friendly face that greets you when you first walk into

Catherine Sandrelli aka Catey is the newest member of our team. Catey is a graduate from Fitchburg State with a degree in Business Administration. She is training with Kim to learn the in's and the outs of our business. She will soon be your contact for any service related items on your accounts. She is excited to learn all about our business



the office as well as the voice on your answering machine reminding you of your appointments.

as well as getting to know our great clients.

Please join us for an informational discussion about Social Security Benefits.



When: 6PM- Wednesday
April 19th, 2017

Where: Kessler
Investments
2070 Main St.
Athol, MA 01331

- Maximizing SS Income for you and your spouse
- Strategies to help reduce taxation of SS benefits
- Understanding the impact & potential costs of starting SS benefits before your full retirement age

Space is limited. Please RSVP to 978-249-2837

The importance of keeping your beneficiaries updated

By Kim Stewart

Why is it that we find this so important? Because it is important to us that your wishes for the future are followed. There are many life changing events that happen in people's lives that are cause for a review of beneficiaries such as death, divorce, marriage, new baby, new church or club. With each of your accounts at Kessler

Investments we can clearly indicate whom and how much you wish to bestow as an inheritance. Often times in the past clients have indicated only a primary beneficiary, such as their spouse. The concern with this is the difficulties that could arise if both spouses were to pass at the same or close time frame? If contingent beneficiaries are not indicated your family could possibly have to create

an estate, appoint an executor, and go through probate just to finalize your accounts. If contingent beneficiaries are listed on the account, we at Kessler Investments can help them quickly through the process with a copy of a death certificate and often one simple form. Please do not hesitate to contact our office if you would like to review your current beneficiaries

YOU WILL NOT SPOT BILL IN A CANOE THIS YEAR IN THE RIVER RAT RACE. HE RECENTLY HAD A SUCCESSFUL ROTATOR CUFF SURGERY AND IS BUSY PERFECTING HIS LEFT HANDED SIGNATURE.



Kessler Investments always seeks to understand the matters of importance of those we serve and to apply the same advice and dedicated leadership as we would apply to ourselves

*Securities offered through Founders Financial Securities, LLC
Member FINRA, SIPC and Registered Investment Advisor*

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