

A Business You Should Know

Focus Strategic Solutions

Kara Stewart focuses on her clients' financial future..



Kara Stewart, President/Principal

Sometimes inspiration finds you when you least expect it. For Kara Stewart, inspiration came during her attendance to a tax-planning summit that not only exposed her to additional creative tax reduction techniques to help transition her clients' success into significance, but it also changed her life personally.

Stewart has nearly two decades' experience working for financial institutions such as Merrill Lynch and Wells Fargo Bank, and almost half of her career with Vantreo Insurance Brokerage as the financial service manager and assistant vice president. She dreamed of opening her own practice. In 2010, Stewart founded her own company, Focus Insurance Brokerage. Stewart has built an impressive reputation amongst her clients, colleagues and peers for her ongoing, individualized attention to her clients; providing extensive knowledge and an unbiased consultation while maintaining the highest standards of integrity.

Kara is recognized by the prestigious Million Dollar Roundtable, (MDRT). MDRT members demonstrate exceptional professional knowledge, strict ethical conduct and outstanding client service. MDRT membership is recognized internationally as the standard of excellence in the life insurance and financial services business.

Stewart places extreme value in her continued education and frequently attends workshops, symposiums, forums and summits to ensure she is always at the cutting-edge of her industry. At this particular conference, she was exposed to powerful, innovative financial techniques, programs and systems that would enable her to help her clients empower their wealth. "I was exposed to new tax reduction strategies that even the veteran CPAs in attendance weren't aware of!" she says. "Immediately after the summit, I reached out to some of my clients

to apply my new planning tools. I was literally moved to tears when I realized the positive impact of the work we completed together, which reduced their current taxes by 50 percent and set them up for a 10 percent taxable retirement. It positively impacted the clients and their entire family for many generations."

Another area of growth she attributes to the tax-planning institute (that she is now a member of and attends frequently), is that she changed her words and in doing so, changed her life. She removed the word "insurance" from her company name, as her strategies are far beyond the placement of insurance. "The word 'insurance' implies you have to have an accident, get sick or die to win. I 'focus' on a clients' living benefits and what products can do, such as tax free accumulation and tax free distribution, not what they are called." says Stewart.

Today, Stewart's newly re-branded business, Focus Strategic Solutions, is the culmination of her expertise in financial planning. Her hands-on, personal approach suits her innate desire to help people. She is truly passionate about her practice and her clients' lives.

The three words of her new business form the pillars to her practice. "I put YOU into focUs" and "get FOCUSed" are Stewart's running mottos, and are the foundation that requires her clients' trust. "We represent a process, not a product," she says. "Who and what is most important to you?" is one of the first questions she asks clients. Another is, "In an ideal world, at what age do you want to retire, and what income do you need to maintain the lifestyle you have become accustomed to?"

Stewart uses "strategic" in her new business name because of her access to trusted advisors such as CPAs, attorneys, and other financial experts. Using their combined resources and expertise, her clients are better

informed, and can appropriately prepare for their financial future.

The word "solutions" refers to her capacity to employ multiple strategies for a tax efficient portfolio and a stable retirement income. Whether it's a plan to create tax-free income for retirement, guaranteed income for life or making a comprehensive succession plan for individuals or businesses, Stewart makes her clients and their goals her top priority. "That's the most important thing about my practice now," she emphasizes. "I don't work *for* you; I work *with* you. Together, we put YOU in focUs!"

Who we are:

Focus Strategic Solutions is a financial planning firm founded and owned by Kara Stewart. Stewart works collaboratively with her clients and other financial analysts to ensure their financial futures are secured by leveraging financial strategies that help reduce taxes and makes the framework for a successful retirement plan.

What we do:

Provide financial consultation tailored to clients specific needs. Services include identifying and reducing taxes and creating tax-free income for retirement. Stewart helps individuals and business owner clients prepare and protect for the financial future by reducing current and future tax by 20 to 60 percent.

How to contact us:

707-974-8707
<http://finsecurity.com/karastewart>
kstewart@focus-ins.com
C.A. License No. 0C47464

