Strassman&Assoc.
Wealth Management | *Your Legacy Matters*

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When you experience a life change, like loss of a loved one or a divorce, regaining a sense of security is important. One area of this sense of insecurity is your Financial Future. One step you can take is to start building a solid Financial Foundation for you and your family. Here are a few simple things you can do now that can start to provide that sense of Financial Security we all want.

1. Order your annual Social Security Statement. Use this to review what income has been reported for you and how much of a benefit you can expect at different ages.

   Go to www.socialsecurity.gov/mystatement.

2. Request your free Annual Credit Report. Federal law requires the three nationwide credit reporting companies to give you a free copy.

   Go to www.annualcreditreport.com

3. Review what Interest Rates you are paying on your Home Mortgage, Auto and Credit Card debt. You may be able to reduce the interest rate by shopping around.

4. Review your Home, Auto, and Health Insurance premiums and deductible. Do you need a new Life Insurance policy?

5. Review and update your Primary and Contingent Beneficiaries in your Will or Trust. Also review your beneficiaries on your IRA or Retirement Accounts, Life Insurance and Annuities.

6. Properly transfer Retirement accounts into your name and ensure it isn't a taxable event.

7. Ever wondered if you or your family has any unclaimed assets out there?

   Go to www.unclaimed.org to research all States.

8. Visit my website at www.yourlegacymatters.com and under the "Resource" tab you will find:
    - Various Financial Calculators
    - Fun and Informational Videos and Flipbooks
    - Simple and Educational Information regarding Retirement and Estate Planning
    - Social Security and how it works
    - Family Love Letter - give your loved ones the great gift of INFORMATION...at a time of confusion caused by incapacity or death

Feel free to call me for a free and confidential visit to discuss any questions or concerns you may have during this difficult time.

Make it a great day!

John Strassman, CFP

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- John Strassman has been providing Financial advice to Central Oregon for 30 years.
- He is a Certified Financial Planner. (CFP)
- He is an Independent Financial Advisor offering investment securities through LPL Financial.
- Financial planning and investment advice is offered through Financial Advocates Investment Management. Financial Advocates and Strassman & Associates are separate entities from LPL Financial.