



Financial Matters

Registered Investment Advisor

Money is only an aspect of life, not life itself. It's a means, not an end. But, the truth is that you live in a world in which your financial condition is likely to be the chief determinant of the type of life you are able to enjoy. Your finances may determine how free you will be. A healthy financial picture will empower you to keep all your options open, and give you financial independence.



Plan for the Future



Invest for Growth



Practice Tax-Advantaged Savings



Rethink Retirement



*Build a Program to Help Lower
Overall Risk of Your Assets*



Gain Financial Independence

Vicki L. Lublin

CERTIFIED FINANCIAL PLANNER™ Professional

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Prepare now to make the most of the rest of your life, and let us help. We are dedicated to providing quality service, products, and options, so you can enhance your potential success in these areas. We would like to help you, so you may become financially independent!

Financial Matters, a financial advising service, has been family owned and operated since 1992. It is all about helping the clients. We start the process by analyzing cash flow streams, existing retirement plans, savings programs, and insurance plans. Through research and discussions, we help our clients understand their individual financial goals, risk tolerances, and objectives. Putting all the pieces together, we make specific recommendations to help our clients achieve their goals.

We offer access to many types of investment products, such as IRAs, Roth IRAs, SIMPLE IRAs, 529 Plans, Coverdell ESAs, and brokerage services. All securities are offered through the broker-dealer, Royal Alliance Associates, Inc. Member FINRA/SIPC. Separately, as a registered investment advisor, we also offer fee-based planning for those clients who prefer. In addition, we offer access to several insurance products, including Life, Disability Income, and Long-Term Care protection. Advisory and Financial Planning services are offered through Financial Matters, a Registered Investment Advisor.

If you are interested in any of these types of services, please call (262) 468-4865 to schedule an appointment between 9 a.m. and 9 p.m., either at Financial Matters located at W375 N7847 Tamarack Drive, Oconomowoc, WI 53066, or in the comfort of your home.

Investing involves risk including the potential loss of principal. No investment strategy can guarantee a profit or protect against loss in periods of declining values.

WHERE TO GO FOR ANSWERS?



Financial Matters

Registered Investment Advisor

*Valuing clients for a lifetime, from generation to generation,
by providing ideas and recommendations to help
enhance financial confidence in this constantly
changing environment.*

Vicki L. Lublin,  **CFP®**


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