

# Guiding you to the Summit...



# ...and Back

AN INTRODUCTION TO



# Aim to achieve better results through efficient financial strategies.

**F**inancial instruments all have positives and negatives. It is only through a suitable balance of financial tools that you can leverage the positive attributes of individual tools and help minimize their negative aspects.

The commitment to achieving a suitable balance can make a tremendous difference in your financial well-being over time. We will help focus your energies on sound economic and research-driven strategies so that you will be able to enjoy the wealth you build for your retirement.

## *What is wrong with traditional financial planning?*

*The financial world tends to focus primarily on seeking investment rates of return.*

Although investments are a part of building financial security this cannot be the primary focus.

Because so much emphasis is focused on seeking high rates of return, seeking efficiencies is ignored.

## *The Longs Peak Financial strategy focuses on EFFICIENCY.*

Efficiencies can improve overall results, help minimize risk and offer increased protection. Instead of merely focusing on rates of return, results can be achieved by :

- Leveraging longer compound interest curves.
- Designing savings and investments to take advantage of the velocity of money for financial opportunities.
- Reducing compounding costs and matching strategies with a lifetime of planning topics.



# Financial well-being requires more than just investment advice.

*The financial industry typically provides financial advice which primarily focuses on investment returns, based on the amount of risk you can stomach.*

With typical financial planning advice, too much emphasis is on statement wealth. (i.e., how much is in your 401(k) worth?)

But *statement wealth can go up and down overnight!*

Of course statement wealth is important, and should be a part of any sound financial plan. But it isn't the only important thing to consider.



## Financial Well-Being May Require:

- Having adequate protection.
- Reserves.
- Access to money.
- Contractual wealth.
- Real property wealth.

*Achieving a suitable balance is one of the the keys to financial well-being.*

# Discover more with a macro-economic approach.

Traditional financial planning focuses on the “above-the-line” possible growth of your money at the expense of ignoring the financial decisions which are subtracting from your wealth building potential. These subtractions have a compounding negative impact.

It is as if your money is growing “above-the-line” with the amount which is being taken away also growing each year. This is one reason it seems to be so hard to get-ahead financially and detracts from your ability to build wealth over a lifetime.

*Many people could  
potentially give up money  
over time – unwillingly and  
unknowingly.*

## *A macro-economic approach helps you discover:*

- How this subtraction occurs.
- How to organize your finances for efficiency.
- How to test your financial decisions to determine if they are going to help or hurt you.
- How to put you in a more flexible position to gain more control.

*This approach also allows you to see  
how financial decisions can affect  
your financial well-being over time.*





# Why visit with Dan at Longs Peak Financial?



## Daniel C. Flanscha

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President, Financial Advisor  
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*Being an educator by trade,  
Dan has a passion for helping  
people learn about finances.*

### BOTTOM LINE:

*You may have more control of  
your wealth and more options  
as time unfolds.*

### HOW YOU COULD BENEFIT:

#### **1** *You will get organized financially.*

Dan will help you get organized so that your finances will no-longer seem like they are in a junk drawer. ***Once you understand the structure of your finances you will begin to see WHAT you are doing financially.*** You will begin to ask yourself suitable questions to receive coaching.

#### **2** *You will learn the cause and effect of financial strategies.*

Being an educator by trade, ***Dan has a passion for helping people learn about finances.*** For those willing to learn, Dan will spend time educating you about the cause and effect of financial strategies.

#### **3** *You will learn how to coordinate your financial strategies.*

Through ***economic testing*** you will learn how the coordination of financial strategies can improve your overall financial efficiency. For those who are still in the accumulation phase of life, you may obtain more liquidity, use and control of your own wealth. For those at or near retirement, Dan will help you design an income plan that allows you to enjoy the wealth you have been able to accumulate.

# *Schedule a no-obligation appointment TODAY, and begin the trek to YOUR Financial Summit!*

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*Learn More On Dan's website:*

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