



Wealth Weiss

*Investing with a Disciplined
& Conservative Approach*

A Publication of Marian Financial Partners, Inc. and APA, Inc.

August 2011

Limited Office Hours

We will have limited office hours beginning August 3rd through August 11th due to our family vacation.

Beware of Offers That Sound Really Good

As a reminder, please be careful out there when it comes to your investments or retirement accounts. There are many new ways (and people) to convince you to do something with your accounts that will likely not be in your best interest.

Most of these techniques focus on greed and promise unusual returns. If in doubt call us for a second opinion.

The Doomsday Scenario:

Sovereign Debt Fears, Global Monetary Crisis, Socialism In America Destroys Growth, Massive Entitlement Programs, Massive Tax Increases, Massive printing of money to pay off debt and repay with deflated dollars, Triple-Digit Inflation and Global Economic Meltdown. These are just some of the things we hear about in the media practically every day...so let's say they're right. How will we survive? Will we be okay? I think so. Do you want to know why I have so much hope? We're offering a special class regarding this doomsday scenario to help our clients (Asset Preservation Alliance & Marian Financial Partners) to understand there's no real reason to panic regardless what happens. These classes will be held in our office and are limited to 20 people per class. We are committed to offering as many classes as necessary so everyone has a chance to attend. Call or email us to reserve your seat. We have 3 class dates available:

August 22nd, 25th or 30th @ 10:30 am
Call 317-888-1240 or email - kathy@marianfinancial.com

It's Family Vacation Time

That's right, the Weiss' are heading out on vacation. Our office will be open for limited hours during our vacation. We will have someone in our office for about 4 hours each day while we're gone to answer the phones and return messages. We ask for your patience during this week and we will promptly fulfill your needs upon our return to our office. Our vacation dates are August 3rd through August 11th.

Is Now the Time to Refinance Your Mortgage?

It's something to consider. Several of our clients have seen the benefits of refinancing their existing mortgages to take advantage of the lower rates. In several cases, we've heard of some impressive overall savings and reduced monthly payments. We recommend you talk to a mortgage professional that's familiar with the latest rules and regulations. Sometimes (not always) the institution that holds your current mortgage will offer some benefits to refinancing through them. We do not offer mortgage services but we do have a mortgage professional with over 20 years in the industry we can refer you to. Give us a call or email us if we can help in anyway.

89.1 FM **Radio Show**

Don't forget to tune in to Catholic Radio Indy 89.1 FM on the last Saturday of each month @ 10:00 AM.

We now have the new Miracle Radios available for those that are unable to listen or pick up the station on your radio. Contact us if you need info on the Miracle Radio. You can also listen via the internet at:

www.catholicradioindy.org

Check out **Marian Financial** **Partners, Inc.** **Website**

www.marianfinancial.com

Annual Reviews

If you would like to have an annual review of your accounts...give us a call. In the past, our office has spent hours trying to get folks to come in for a complimentary annual review and some folks like the reviews while others have taken care of most of the important items we've discussed over the years. To better serve you and our other clients, we are asking you to contact us if an annual review is needed. By all means, our door has always been open and remains open to all. Please let us know how we can assist you.

Got Legal Docs?

Do you have your legal documents in order? If not, what are waiting for? It's extremely important that everyone has their legal documents in order and up-to-date. For most families, a Living Trust or Will (your attorney can help you decide which is best for your situation), Powers of Attorney's (POA'S) for financial & health related affairs and Living Will are the basics to consider. It is highly recommended that if you already have POA's and they are over 5 years, then you should have them reviewed to ensure they are up-to-date with the latest language for Medicaid and HIPPA. It's very easy to get your documents either created or revised while you're healthy. It's a whole different story if you put it off or your documents are out-of date. There's a very good chance you will be denied access to your spouse's IRA and/or 401(k) if you do not have POA's or they're outdated. For these types of documents, it is recommended you work with an Elder Law Attorney or an Estate Planning Attorney. These attorneys specialize in estate related documents and keep up-to-date with all of the law changes in this particular area of law. We do not offer legal services or advice but we do have an elder law attorney with over 20 years in the industry we can refer you to. Give us a call or email us if we can help in anyway.



Weiss Family Update

Summer seems like it's almost over...or least softball season is coming to an end. Haylee finished up her recreation softball league on July 21st and Allyson's season winds down at the end of their Worlds Series which begins on Monday July 25th in Noblesville. Allyson's team, the Indiana Irish, has won several tournaments throughout this season with their most recent being at Center Grove. It has been a very busy summer with both girls playing softball at different locations. The Weiss family vacation is set for the first week of August. The family has not been hot enough over the last several weeks so they're heading to Sanibel Island, Florida in search of some really hot weather☺. At least there will be a beach and a pool nearby with a nice ocean breeze to ease the heat. The girls will be starting school before you know it. Haylee will be a freshman this year and attending Lumen Christi Catholic High School and Allyson will be in the 7th grade at St. Barnabas. In the spring, Kathy & Bryan had personal best times while running in the Mini-Marathon. Kathy ran the full half-marathon (13.1 miles) at a blazing speed of 1:59:36 while trimming 22 minutes from her last mini-marathon run. Bryan ran the 5K (3.1 miles) at near lighting speed of 25:49 while trimming almost 3 minutes off of last years' time. Haylee & Allyson also participated in the 5k portion and seemed to really enjoy all the festivities surrounding the event. After 28 years, Bryan finally sold his 1965 Mustang which sold in less than 24 hours on EBay. You may ask, why in the world would Bryan ever sell his Mustang? Well the simple answer is that over the years Bryan lost his passion for the older car because he only drove it on a rare occasion. Oh by the way, he also had the opportunity to buy his brother's red 2009 Roush Mustang too (with only 4,000 miles on it). On Father's day, Bryan picked up his new Mustang at his brother's home in New Albany, IN. So far, nearly 800 miles have been put on the new Mustang...that's more miles than he put on the old 1965 Mustang in 15 years. So if you hear a loud roar and see a red streak going by the streets of Greenwood, it might be Bryan in his Mustang☺.

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