



A Registered Investment Adviser



# Wealth Weiss

Investing with a *Disciplined  
& Conservative Approach*

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

November 2013

## Office Hours

*Our Office will be closed for the Thanksgiving Holiday on Thurs. and Friday Nov. 28<sup>th</sup> and 29<sup>th</sup>. We will also be closed for Christmas & New Years, with limited hours over the Christmas Holiday.*

## New Office Location

*Don't forget our office is now located at 698 Oldefield Commons Drive, Suite 1, Greenwood, IN 46142*

## 2013 Nobel Prize for Economic Sciences

*We are happy to inform you that one of the key economic engineers behind our portfolio design was recently awarded a Nobel Prize in Economics.*

### **Congratulations**

*Dr. Eugene Fama!  
Professor, University of Chicago, Chicago Booth School of Business*

## Meet the Team

We recently had a ribbon-cutting ceremony with the Greenwood Chamber of Commerce to celebrate our office relocation. A staff photo was taken (below) for us in our new lobby. Pictured from left to right: Kathy Weiss, Bryan Weiss, Rick Ormes (Investment Advisor Rep.), Katie Pirau (Administrative Assistant), Joe Ray (Investment Advisor Rep.).



**Katie Pirau** has joined our firm as Bryan's Administrative Assistant. This will allow Bryan to focus directly on our investors/clients and education classes in our new classroom. **Rick Ormes & Joe Ray** are Investment Advisor Representatives for Marian Financial Partners, Inc. and assist their clients directly with **Bryan Weiss**, their Investor Coach. **Kathy Weiss** is Administrative Support for both Marian Financial Partners, Inc. & Asset Preservation Alliance, Inc.

## Our Christmas Movie Event – Invitation!

**Sunday December 15th, 2013 @ 6:30 pm**

(Doors open at 6:00)

**The Artcraft Theatre**

57 N. Main St., Franklin, IN 46131

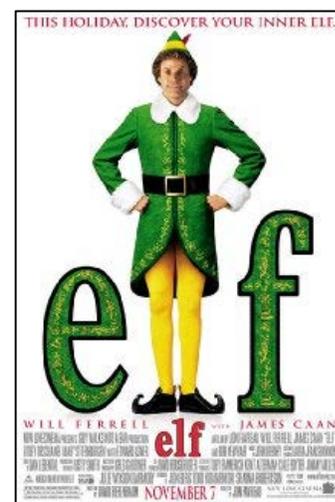
# elf

*Plan to attend our event with your family and friends.*

**Let us know if you can attend and how many in your party:**

**email: [katie@marianfinancial.com](mailto:katie@marianfinancial.com) OR Call: 317-888-9465**

*This is a private showing for clients, guests and friends of Marian Financial Partners and Asset Preservation Alliance.*



### **Required Minimum Distributions**

If you turn 70½ this year and have an IRA account, you must begin taking required minimum distributions (RMD's) by April 1<sup>st</sup>, 2014. Please make sure you are meeting this IRS requirement each year or you could incur a substantial penalty.

### **Annual Reviews**

We mentioned in previous newsletters that we are no longer calling each client to schedule an annual review. We're happy to meet with you whenever, or as often, as you like. Simply call us and we'll get you on the schedule; even if you need a second opinion on a different investment idea.

### **SERVICES OFFERED**

- 401k Management
- 401k Rollovers
- Roth Conversions
- Tax Planning
- Estate Planning
- Retirement Plan Advice
- Retirement Income Planning
- Investment Planning
- Long Term Care Planning

### **IRA & Roth IRA Contribution Deadline**

To ensure you receive credit please have your contributions to us no later than April 4<sup>th</sup>, 2014.

## **IRS Warns of Pervasive Telephone Scam**

IR-2013-84, Oct. 31, 2013

WASHINGTON — The Internal Revenue Service today warned consumers about a sophisticated phone scam targeting taxpayers, including recent immigrants, throughout the country.

Victims are told they owe money to the IRS, and it must be paid promptly through a pre-loaded debit card or wire transfer. If the victims refuse to cooperate, they are then threatened with arrest, deportation or suspension of a business or driver's license. In many cases, the caller becomes hostile and insulting.

"This scam has hit taxpayers in nearly every state in the country. We want to educate taxpayers so they can help protect themselves. Rest assured, we do not and will not ask for credit card numbers over the phone, nor request a pre-paid debit card or wire transfer," says IRS Acting Commissioner Danny Werfel. "If someone unexpectedly calls claiming to be from the IRS and threatens police arrest, deportation or license revocation if you don't pay immediately, that is a sign that it really isn't the IRS calling." Werfel noted that the first IRS contact with taxpayers on a tax issue is likely to occur via mail.

Additional information related to this scam, including instructions of what to do if you believe you have been contacted by someone claiming to be the IRS, is available at the IRS web link below. If in doubt, without giving any of your personal information out, ask the person to put the information being sought in the mail (not email). We all must be vigilant against phone and email scams of all types at all times.

<http://www.irs.gov/uac/Newsroom/IRS-Warns-of-Pervasive-Telephone-Scam>

## **Weiss Family Update**



It's finally happened; Haylee has her driver's license and has purchased her first car with the money she's saved from various babysitting jobs, working part-time at our office and as well as part-time tutoring children at a local tutoring center. Haylee now drives herself and her sister Allyson to school each day. While that may not sound like much, their school is located



downtown, near Holy Rosary Parish and the Lilly Corporate Center, so Haylee has quite a drive each day to and from school. Having Allyson in the car with her is like having Bryan in the car too. Allyson serves as Bryan's eyes and ears when he's not able to be with them☺. He receives a complete replay of the day's activity including a complete driver's report. Allyson has started to practice driving in large, open parking lots with some success. During a recent Fall softball tournament, Allyson hit her first over-the-fence home-run. She has hit numerous in-field home runs to the fence but this was her first one over-the-fence. Of course, Bryan had to go retrieve the ball from a nearby pond for Allyson's trophy shelf. Kathy and Bryan celebrated their 27<sup>th</sup> wedding anniversary on October 25<sup>th</sup> and are looking forward to many, many more happy years together. It's hard to believe the Weiss family will soon begin visiting colleges with Haylee! Bryan's in favor of locations that provide abundant sunshine and fishing opportunities. Stay tuned... From our family to your family: **May all of you have a blessed Thanksgiving and Christmas Season!**