



# Wealth Weiss

*Investing with a Disciplined  
& Conservative Approach*

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

June 2015

## **Holiday Hours**

Our office will be closed July 3<sup>rd</sup> in observance of the July 4<sup>th</sup> holiday.

## **Special Offer** **From** **Frank & Kraft,** **Attorneys-at Law**

Frank & Kraft, Attorneys-at-Law have offered my clients a free two (2) hour initial consultation and also \$225 off of their standard living trust fees. If you do not have an estate plan or the one you have is outdated, you might consider contacting the Frank & Kraft office to get the process started.  
317-684-1100

Please let them know that you are our clients when calling for an appointment.

## **Updated Info**

For an updated ADV Part 2 or a copy of our Privacy Policy, please contact our office or go to:  
[www.marianfinancial.com](http://www.marianfinancial.com)

## **Dreams Do Come True! More Investors To Be Saved**

Dear Investors and Clients, we have exciting news to share with all of you. More investors are about to be saved and join the same Matson Money investment community just as you have. It's been a long-time dream of Bryan's to help "Save the Investor. Save the World." from the bullies of Wall Street in the Indianapolis area.

For the past two years, Bryan has been in discussions with a major estate planning law firm in the Indianapolis area named Frank & Kraft, Attorneys-at-Law. In addition to offering estate planning services, they have offered investment services through a broker/dealer arrangement for over ten years. The Co-Founder and senior Principal of Frank & Kraft, Paul Kraft, was introduced to Matson Money and Bryan in April 2013 while at an attorney conference in Philadelphia. Once introduced to Matson Money, Mr. Kraft began his journey towards learning the Matson investment philosophy/process and how his investors could potentially benefit by investing in a more prudent academic approach. Mr. Kraft quickly noticed that Matson Money's approach to investing is more investor-centered, with a focus on education. Matson's investment philosophy is based on portfolios engineered with a passive academic data that does not include the typical stock picking, market-timing and track record investing many others do. He also appreciated the integrity of our firm, Marian Financial Partners, Inc. and that of Matson Money...We say what we do and we do what we say. Very simple, but yet hard to do in an industry filled with investor traps everywhere.

Fast forward to June 2015, nothing changes whatsoever at Marian Financial Partners, Inc. going forward. Bryan is, and will remain President, Owner and Investor Coach. In order to ensure our investors and clients see no changes, Mr. Kraft and Bryan have decided to create a completely new and separate investment firm called Frank & Kraft Wealth Coaching, Inc. (FKWC). The new firm will reside at the Frank & Kraft Law Office located downtown Indianapolis only. There will not be any FKWC investor-related meetings or functions at our current Marian Financial Partners office. This office is, and will remain, for you only.

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## **Annual Reviews**

We mentioned in previous newsletters that we are no longer calling each client to schedule an annual review. 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

### **Worthless Investment Information**

Most of the investment tips you hear in the media are absolutely worthless. They typically refer to something that's already happened and that's no indication of what the future holds.

Remember the three basic rules to investing:

1. Own Equities
2. Diversify
3. Rebalance

Add fixed income to offset the equities to reduce the risk to meet your long-term goal. If someone is talking about a hot stock or sector, it's too late, that's speculation.

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**Here's the fun part:** Bryan will be the investor coach for both investment firms going forward. There's only one Bryan and two different offices. Keep in mind, this is nothing new, i.e., doctors, dentist, lawyers etc. have multiple offices, and everything goes well. Granted, there will be some growing pains as we transition into this new phase. Rest assured, we will be putting systems in place to ensure everything goes as smoothly as possible. We will likely be adding a receptionist to assist us with greeting our guests, investors and answering the phone.

**Here's the key to our success:** Katie Gregory, our Administrative Assistant, has done an awesome job of learning all aspects of the account administration process to service our investor needs. Katie is an integral part of our business and ensures our investors' needs are met on a daily basis. As Bryan's administrative assistant, Katie will be responsible for most investor service-related items, i.e., IRA distributions, withdraws and other account-related items. Going forward, Katie will be the first point of contact for all account-related items. If necessary, Katie will elevate any issues to Bryan as needed. Bryan will continue to conduct our Investor Education Classes and provide investor-coaching (and any investment advice) as in the past. We do ask for your patience during this period of transitioning into Bryan's dream of reaching out to investors in the Indianapolis Metro area becomes a reality. We look forward to providing all of you more updates on our progress over the next few months.

Happy Returns☺!

## **Weiss Family Update**

It's summer and you know what that means...softball! That's right, the softball season has officially started for the Weiss family. Allyson started her season this year with three hits to the fence along with plenty of bumps and bruises too. Allyson has officially become a licensed driver in the State of Indiana. She will be a junior in high school in the upcoming school year and most likely drive herself to school each day.

Haylee has decided to call Aquinas College in Nashville, Tennessee, her new home this fall. She received the prestigious Marianelli Teacher Education Scholarship since she will be focusing her studies on Elementary Education. Haylee has already started collecting items for her dorm room and she may even have her roommate selected. Haylee took golf lessons this past spring and spends time with Bryan at the driving range and playing a quick 9 holes after work.

Kathy recently competed in the inaugural 5k run at Saints Francis & Clare Parish this spring and finished 4<sup>th</sup> in her age group. She's planning three more 5k's over the next few months.

**We hope you all have a great summer!**