



Wealth Weiss

*Investing with a Disciplined
& Conservative Approach*

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

February 2017

New Fiduciary Rule – Status Unknown.

As you may recall, this April, a new Department of Labor Rule was to take effect which would require all investment professionals to act as fiduciaries for their investors (imagine that). Currently there is a 180 day delay in the rollout of this rule. Regardless of the rule, we have and will continue to operate as a fiduciary for all of our investors. We'll keep you posted.

Investor Education Class

How Did Your Portfolio Survive 2016?

Thurs. 2/23 @ noon
Or
Thurs. 2/23 @ 6:00

*We'll have Jet's Pizza
at both classes.*

Call 317-888-9465
To reserve your seat.

2016 - What a Year?

Can you believe it? We survived 2016! That's right, if you're reading this newsletter, you actually made it through an amazing year. Congratulations to our investors! You did GREAT! As you may recall, the first six weeks of 2016 were very unsettling for the global stock markets. Just as soon as everything seemed to have settled down we had the BREXIT to deal with. Oh yeah, don't forget we had a highly contested Presidential election like we have never seen before.

In spite of all the negativity and the lack of hope throughout the majority of 2016, our investors stayed the course and reaped the rewards of being disciplined investors. In doing so, we witnessed the DOW Jones Industrial Average index (and other indices) reach record levels and rewarding investors who dared to stay invested with impressive returns. You may actually be surprised with how well the different parts of our portfolio performed during 2016. Investors are encouraged to reference their recent Matson Money quarterly statement for more details.

What can we learn from this? First of all, the media or talking heads have no clue what the market is going to do at any point now or in the future. Many media outlets simply play on the fears of the public and push the crisis of the day. As disciplined investors, we need to tune out the media whenever possible, stay invested and rebalance as needed and attend one of our regular Investor Education Classes whenever possible. If need be, a one-on-one coaching session may be necessary depending on your stress level. Remember, regardless of what the market does, our portfolios are built with risk control in mind in addition to generating returns. Stay invested and Keep Calm.

A New Face at Marian Financial Partners

In case you haven't noticed, we have a new administrative assistant in our office. Elizabeth (Liz) Leffler started with us in mid-November and was personally trained by Katie for almost six weeks. We are very fortunate to have Elizabeth join our team. She brings with her many years of similar industry experience that has already proven to be beneficial. She can be reached at liz@marianfinancial.com or 317-888-9465. She has really enjoyed getting to know many of our investors in the short time she's been with us.

Flag Retirement



Is it time to retire your U.S. flag? If so, we can help you make sure it's done in an honorable way. You are welcome to drop off any U.S. flags in need of retirement throughout the year. We will ensure that your flags are retired with the dignity they deserve.

"Matson Money Live!"

"Matson Money Live!" is back with a brand new schedule. Tune in the first Tuesday of each month at 3pm ET with the exception of holidays. You can watch the show at:

www.livestream.com/markmatson

Remember to:

Keep Calm & Rebalance

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

Tax Time is Upon Us

It's that time of year again. Depending on the type of accounts you have, Charles Schwab can mail out some tax related documents for non-IRA related mutual funds as late as mid-February. Typically most tax related documents are received by investors by the last week of February. Please let us know if you are expecting a tax document and it's not been received by the end of February. We can always email you any tax related documents in the event you may have some missing.

If you're eligible and would like to make a previous year (2016) contribution to your IRA or Roth IRA accounts, please do so no later than Monday, April 10th.

Recharacterizations of IRA or Roth IRA Contributions: If you contributed too much to your IRA or Roth IRA based on your annual income, it is recommended that you recharacterize the excess contributions by April 15. If in doubt, please consult with your tax professional.

Weiss Family Update

This past fall, Bryan and Kathy celebrated their 30th Wedding Anniversary. They did so on a beach in Montego Bay, Jamaica. Their original plan was to celebrate their special moment on a southern Bahama Island called Great Exuma. Unfortunately, Hurricane Matthew had other plans and made a direct hit at the very location they planned to visit. Great Exuma remains in the future view for Bryan & Kathy but they are sure to avoid hurricane season the next time around.

Haylee recently jetted off to Bracciano, Italy to spend her spring semester hanging out in the Italian countryside at the Aquinas College Bracciano Campus. That's right, Haylee will be in Italy for approximately 87 days along with six other girls from Aquinas College. Bracciano is located northwest of Rome and about an hour train ride. They plan to visit many of the historic sites throughout the area including Florence and Assisi. Bryan, Kathy and Allyson plan to visit Haylee in Rome this spring.

Bryan recently started hitting things - punching bags that is. That's right, Bryan has really developed a fondness of hitting punching bags on a regular basis. A local gym called 9Round Fitness has become Bryan's favorite fitness hangout. The gym offers a quick 30 minute high intensity workout that fits perfectly into Bryan's crazy schedule.

Allyson and Kathy joined 9Round after they saw how much fun Bryan was having. They also saw how fit and trim he was becoming☺. Allyson caught the attention of the 9Round owner and he offered her a job. Allyson received her Letter of Acceptance from Aquinas College and was recently invited to attend their Scholarship Interview Day.

Kathy and Bryan hope to run the 5k portion of the 500 Mini-Marathon. Of course Bryan will be trying to beat his time from last year. Kathy ran the half-marathon last year so a 5k should be a breeze for her.

Remember, spring is just around the corner.

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