

Famous last words... "If only I had invested."



Age 25 to 35

"You don't expect me to invest now do you? Remember, I've only been working a few years."



Age 18 to 25

"Me Invest? Are you kidding? I'm just getting my education."

Age 35 to 45

"How can I invest now? Married, children to care for...why I never had so many expenses in my life."



Age 55 to 65

"I know I should be investing now, but money is tight. It's not so easy for a man my age to better himself."



Age 45 to 55

"I wish I could invest now but I just can't do it. I have two children in college and it's taking every cent and more to keep them there."



Age 65 & over

"Yes, it's too late now. We are living with our eldest son. It isn't so nice, but what else can we do?"

What are you doing to make the next five years better than the past five years?

If you would like to take the next step in planning your financial future, OR if you are unsure about any part of your current financial plan, STOP PROCRASTINATING. CALL OR VISIT MY WEBSITE TODAY.

DAMON MONTGOMERY
FINANCIAL MANAGER

610-810-3227

westoakfinancial@gmail.com

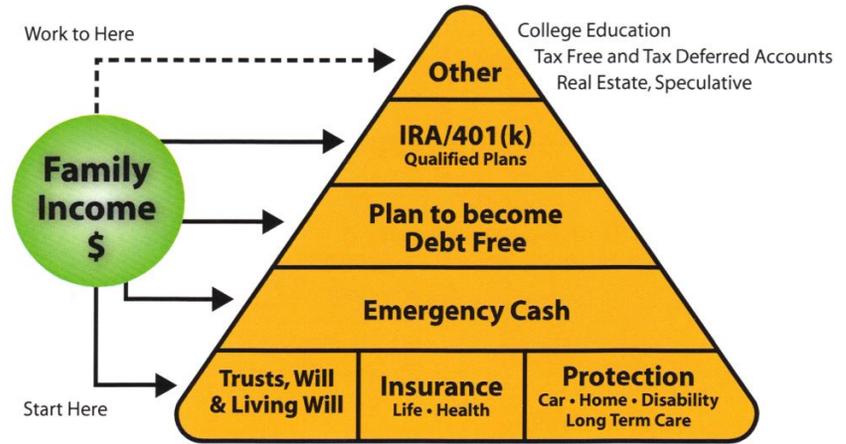
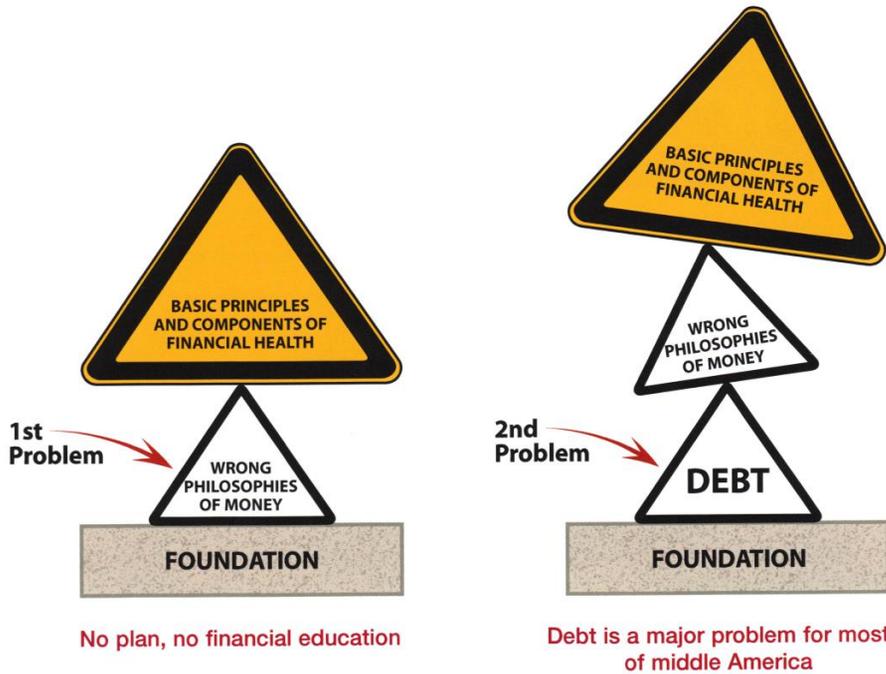
<http://www.westoakfinancial.org/>

What About Your Financial House?



Is it setting on a solid foundation?

A PLAN FOR A SOUND FINANCIAL FUTURE



BASIC PRINCIPLES AND PROPER ORDER FOR THE COMPONENTS OF A PLAN TO FINANCIAL HEALTH

Planning is the FIRST step to taking control of your financial future!

SOLUTION

Eliminating the 2 Major Problems Gives You a Solid Foundation to Build On



Living Trust

Even if you have a will, when you pass away your estate will likely end up in probate costing your family thousands. A living trust can help your family avoid probate saving them time, money, and frustration.

Life Insurance

You work hard to provide your family with a better future. If you were to pass away uninsured, your family would struggle to make that future a reality. Adequate life insurance is the only way to ensure your family's quality of life.

Supplemental Medical Insurance

With the rising cost of medical care and health insurance deductibles; Accident Insurance, Emergency Insurance, Disability Insurance, and Critical Care Insurance are excellent ways to leverage yourself against sickness and/or injury.

Long-Term Savings

People are living longer today than ever before, and as a result are outliving their retirements. Social security, pensions, and 401(k) plans are not enough. If you want to reach your retirement goals,