

Becoming a client of Drake Saunders & Diwinsky

It's all about a trusting relationship - and peace of mind



DRAKE, SAUNDERS & DIWINSKYTM
A RETIREMENT PLANNING COMPANY

Our first meeting:

At our initial 60-minute, no-strings-attached, meeting we learn about each other. We talk about our respective backgrounds, values and philosophies about money, risk and legacy. This is an opportunity to evaluate each other. Slightly more than half of those who meet with us choose to attend a second meeting.

Our second meeting:

If you choose to return, we conduct a 24-item checklist driven by our proprietary software to evaluate your current retirement game plan, whether you are a do-it-yourself investor or you have any kind of relationship with another company. The very fact we are talking to each other suggests you are not totally happy with your status quo. The checklist will go a very long way toward quantifying your concerns. If you score very highly, frankly you probably should remain where you are. If your score is low, then it makes sense for us to discuss working together. Nearly nine of 10 move on to a third meeting.

Our third meeting:

By now, you are comfortable considering a new direction and taking more control of your own financial destiny. At the same time, we have a much greater understanding of your retirement goals and dissatisfaction with your current situation. Now, we evaluate your financial situation and create a custom retirement plan. More than nine of 10 who go through our third-meeting process choose Drake Saunders & Diwinsky as their retirement-plan advisor.

We invite you to our new offices at 104 Crowell Road, Chatham. You will receive complimentary copy of *The Retirement Savings Time Bomb...and How to Defuse it: A five-Step Action Plan for Protecting your IRAs, 401(k)s and Other Retirement Plans.*

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Advisory services offered through JWKodak Capital Management, LLC, an investment advisor registered with the U.S. Securities and Exchange Commission. Drake, Saunders & Diwinsky and JWKodak are separate companies; however, Brian Drake and Jane Bourette are Investment Advisor Representatives with JWKodak Capital Management, LLC.