Let me introduce myself...



Hello, I'm Chuck Taylor. I work with many people that have experienced job change and do not know what to do with their old 401(k). The problem is that there are so many choices and options that it can become quite confusing.

I'd like to become your Personal Financial Guide.

You've spent too much time working hard for what you've earned. I want to help you organize your finances and create an investment plan that is built around your needs & dreams.

With a little guidance and proper planning you can move your prior 401(k) in to an IRA of your own. Then we can create a personal asset management strategy that is designed for you.

Time is money. Don't sit around wondering what to do anymore; pick up the phone and give me a call for a Free Consultation.

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FOUR POINTS ADVISORY

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2013



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Providing Guidance to Seek Out Investment Solutions.

Taking Charge of Your Future...

When job change happens you don't have to leave your investments behind and unattended.



FOUR POINTS ADVISORY is here to help you move your retirement account from your previous employer in to your own Personal IRA.



We will work with you to design and manage an investment strategy for your risk tolerance.



We're Working Hard To Provide Solutions For Our Clients...

In order to have a productive conversation you should take a few moments to gather up some basic information that can be used to prepare an initial investment proposal.

Don't worry, we never charge you a fee to prepare a portfolio proposal. We work on an affordable tiered fee schedule and only earn a small percentage as an advisory fee if you decide to become a client of ours.

If other products or services are necessary we will disclose and review all fees in advance.

CHECKLIST:

- I.) Gather up your most recent investment statements from all of the accounts you would like to have reviewed.
- 2.) Go to www.fourpointsadvisory.com and proceed to the Client Portal Tab in order to download & print the Client Risk Profile.
- 3.) When you have your Statements in-hand and have completed the Client Risk Profile, give us a call to arrange to send us your information.
- 4.) We'll complete the proposal and call you to arrange a convenient time to review our findings and recommendations with you.

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ABOUT US

FOUR POINTS ADVISORY specializes in working with Individuals and Small Business Owners in order to provide affordable access to an Investment Advisor of your own. Our goal is to help our clients build a financial foundation for life.

As an Independent Advisor we are not obligated to use any one product, which gives us the ability to do what is best for our clients.

Don't go it alone. Now you too can have affordable access to an Investment Advisor of your own.

Four Points Advisory is currently licensed in MN & WI

Q: Why would I want to transfer my old 401k to an IRA in my name?

A: In protecting your investments out of sight & out of mind might be a good rule to follow for some things in life, but your investments aren't one of them. When it comes to your investments what was a good choice when you first acted might not be the best choice today. They are more similar to a garden in that once you plant it you need to weed it, water it, and tend to it. Your portfolio should be monitored and tended to in order to have the best chance of attaining your long-term goals.

Q: Can I access money from my retirement account in order to start my own business?

A: Yes. There are a couple of legal options that might be suitable. With that said, the options need to be reviewed carefully for expense, suitability, and IRS regulatory compliance.