

## When thinking of retirement, most clients want to know...

- How much money will I need to retire?
- How can I get the most out of my 401K or IRA?
- How can I increase my income and reduce my income taxes at the same time?
- How can I maximize the return on my investments while reducing risk?
- Should I buy Long-term Care insurance?
- Is my existing life insurance or annuity still appropriate?
- Is a Reverse Mortgage needed to help fund retirement?
- What do I need to know about wills, trusts, and probate?

## We can answer your questions and help you to:

- Plan appropriately for rising health care costs
- Protect assets from unnecessary taxes
- Plan so you won't outlive your retirement savings

## VISIT OUR WEBSITE TO FIND HELPFUL TOOLS AND RESOURCES:

### LEARNING CENTER

- Articles
- Calculators
- Newsletters
- E-Seminars
- Glossary of Terms

### MARKET WATCH

- Detailed Quote
- Symbol Lookup
- Multi-Quote
- Markets At A Glance
- Charting
- Portfolio

### REQUEST A QUOTE

- Annuity
- Life Insurance
- 401(k) Information Request
- Long Term Care Insurance
- Mortgage Qualification
- Information Request Service



DRAKE, SAUNDERS & DIWINSKY <sup>Ltd</sup>

A RETIREMENT PLANNING COMPANY

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## Drake, Saunders & Diwinsky

A RETIREMENT PLANNING COMPANY

*Personalized financial planning for  
baby-boomers and beyond*

We specialize in providing clients with  
**peace of mind**  
by helping them protect their assets  
before, during, and after retirement.

Contact our office for a free consultation

Tel. 866-842-7722

Email: [Info@RetirementMoney.biz](mailto:Info@RetirementMoney.biz)

**Our services can help you establish a sound financial program.**

**We offer:**

- Tax-reduction Strategies
- Investment management
  - o Stocks
  - o Mutual funds
  - o Access to institutional money managers
- Retirement Planning
- Estate planning and preservation
- Asset protection through insurance and annuity products
- Referrals to reputable accounting and legal partners

**Drake, Saunders & Diwinsky now offers clients unique access to institutional money managers – even for investors with moderate investment amounts.**

“This provides an exciting new opportunity for investors who would like to have their money managed by highly experienced and respected institutional money managers... **Our company is very excited to be able to bring access to these advisors to clients with minimum investable assets of \$25,000.** This will open a new world of investment opportunities for clients who thought they had limited options.”

- Brian Drake, President

**As specialists in retirement planning and estate conservation, we can help you to answer the questions you may have about your financial future.**

**Our job is to:**

- Recommend solutions that fit your needs
- Deliver timely information
- Explain how changing financial conditions may affect you
- Monitor your financial progress
- Provide you with state-of-the-art tools and resources



**Brian Drake**

Brian@RetirementMoney.biz

Brian has served as President of Drake, Saunders & Diwinsky, Ltd. since 2002 and has been in the insurance and financial services business for over 34 years. Among his many accomplishments, Brian created one of the largest Property and Casualty agencies on Cape Cod. He also worked for a number of large Wall Street firms before forming his own investment practice in South Orleans.

Brian is a Registered Investment Advisor Representative and Registered Financial Consultant with extensive experience in the distribution rules for retirement plans.



**Jane Bourette**

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Jane has been trained at the Learning Institute for Financial Executives and specializes in life and long-term care insurance and assists with retirement and estate planning. Jane has over 29 years of sales and marketing experience and has extensive experience in retirement planning for the baby-boomer generation.

## **Keep the IRS out of your IRA!**

**If you are doing a rollover**

**Taking a *distribution***

**Or designating *beneficiaries*,**

**Be sure you understand the rules.**

**Call or email for a Free Report**

**Toll Free (24 Hours)  
866-842-7722**

**info@RetirementMoney.biz**

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