

SENIOR SPECIALIST PROFILE



COMPREHENSIVE FINANCIAL PLAN AND OTHER FINANCIAL NEEDS



IS YOUR FINANCIAL PLAN DESIGNED TO MEET YOUR NEEDS?

Managing wealth with an eye toward the future demands vigilance and skill in today's global economy. Over the years, I've worked with clients and their other professional advisors – including attorneys and accountants – to create comprehensive wealth management plan designed to make the best use of their wealth today and help ensure its endurance for future generations. And I'll do the same for you. I can offer you an array of personalized services, support and guidance that can help make a positive difference in the pursuit of your financial goals.



South Orange County Chapter

WHAT YOU WILL LEARN:

- Longevity Planning
- Investment Strategies
- Long Term care financing strategies
- Income Strategies
- Tax diversification strategies
- Retirement Planning
- Estate, Charitable Giving & Trust
- Financial Education

SSG can customize a presentation or series of talks based on your group's needs and interests. Please call for more details.

Lily Schweitzer, AAMS®, CRPS®

Financial Advisor

Certified Plan Fiduciary Advisor

For over 25 years, Lily has brought passion, dedication, and experience to her work in financial services. As a *Chartered Retirement Plans SpecialistSM, an *Accredited Asset Management SpecialistSM and holder of Series 7, 63, 66 and CA insurance license 0H67946; her impeccable reputation for exceeding client expectations has garnered a large volume of repeat and referral clientele.

"I firmly believe that anyone, anytime, can achieve financial success with the right tools, guidance and support. Please don't hesitate to call anytime."

Lily Schweitzer

www.LilySchweitzer.com

SENIOR SPECIALISTS GROUP

"LINKING THE COMMUNITY TO THE NEEDS OF SENIORS"

818.691.2621

Contact the Senior Specialists Group (SSG) to schedule an educational presentation or request services from our team of qualified professionals.

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