Do You Enjoy Roller Coasters?

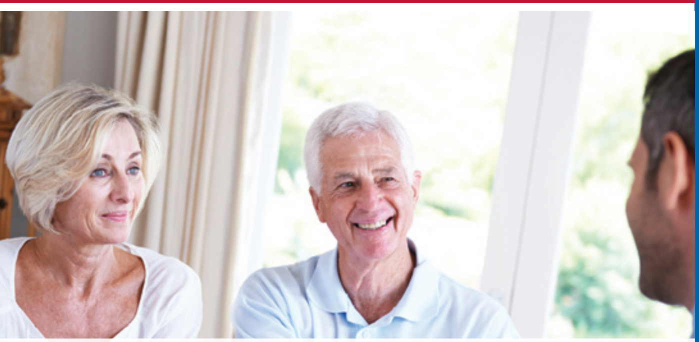
Millions of people ride roller coasters each year, knowing that roller coasters are both fun and safe. After all, these rides are designed by engineers, built by qualified contractors, and inspected on a regular basis.

Does Your Financial Life Feel Like an Out-of-Control Roller Coaster Ride?

Do you feel as though your financial affairs are a “wild ride” that’s in danger of derailing?

Or do you relax knowing you have an experienced Financial Advisor like Dan Roberts keeping the “ride” enjoyable for you?

Working with Dan is like having an experienced engineer who designs the ride (i.e. your financial plan), a qualified builder who puts all the pieces in place, and a diligent inspector who regularly monitors everything to keep it working as planned.



TO SCHEDULE A FREE 2-HOUR CONSULTATION CALL (714) 669-1855

Work with a Highly Qualified Financial Advisor

Few Financial Advisors possess Dan Robert’s breadth and depth of financial experience, education and training, including:

- **Over 40 years** of financial services experience.
- **Master of Science** in Financial Services.
- **Bachelor of Science** in Risk and Insurance.
- **15 Advanced Certifications** in financial planning disciplines.
- **8 Financial Licenses**, including Series 7, 24 and 63.
- **Recognition** as a 5 Star Wealth Manager.*
- **Leadership** roles in professional associations and regular columns in local and national publications.

714-669-1855

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DanielRobertsMSFS@CambridgeResource.com

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Santa Ana, CA 92705

*To receive the Five Star Wealth Manager award, individuals must satisfy a series of eligibility and evaluation criteria associated with wealth managers who provide services to clients. Recipients are identified through research conducted by industry peers and firms. Third party rankings and recognitions from rating services or publications are not indicative of past or future investment performance. For more information, go to www.fivestarprofessional.com.

Although Roller Coasters Can Be Fun,

Your Financial Life Shouldn’t Feel Like a SCARY RIDE!

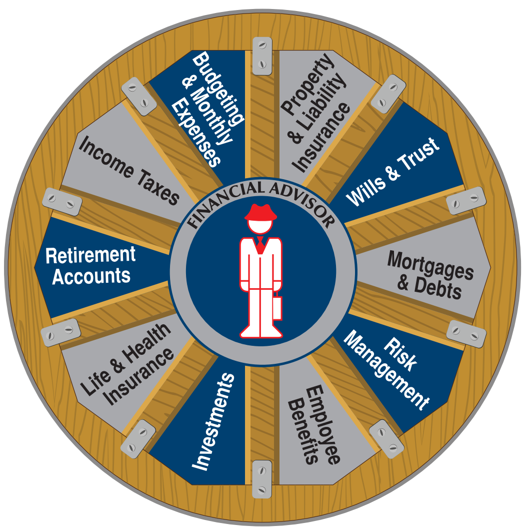
Daniel Roberts, MSFS
Financial Advisor

(714) 669-1855
www.DanielRobertsMSFS.com

Who is Watching Over Your Financial "Big Picture"?

Your financial life is like a wheel with many different spokes. But if you're like most people, you're working with a variety of advisors – insurance agents, bankers, stock brokers, accountants, lawyers, etc. – who each only care about one or two particular things.

The problem with this approach is that you can end up with a lot of well-designed spokes, but a wheel that does not work!



Set Yourself Up for Financial Success

When you work with Dan Roberts you get one professional watching over *all* aspects of your financial life. As a full-service Financial Advisor Dan takes a holistic approach, fine tuning each aspect of your financial affairs to ensure that the entire wheel runs smoothly for you.

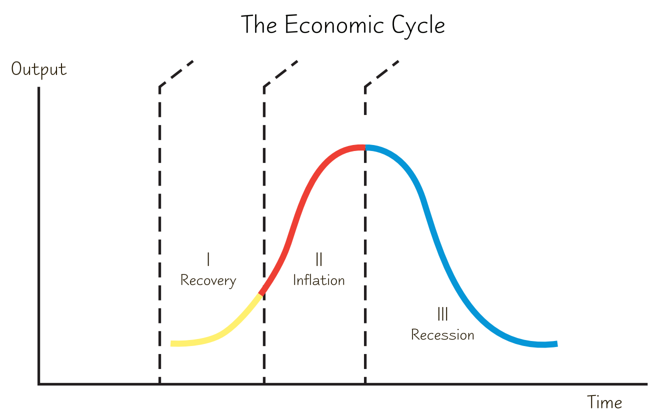
Are You Just "Buying and Holding"?

Over his 40+ years as a Financial Advisor, Dan has seen the shortcomings of the "buy and hold" strategy.

It's a fact that our economy has three main phases: Recovery, Inflation and Recession. Stocks soar during periods of economic recovery, but take a beating during recessions. Bonds usually do best during recessions, but perform poorly during inflationary periods. And so forth.

Take Advantage of the Economic Cycle

Dan uses a Cyclical Investment Strategy that involves regularly adjusting investments to reflect where we're at in the recovery-inflation -recession cycle. After all, "buy and hold" only makes sense until the next phase in this cycle begins.



Do You Have a Comprehensive Financial Plan in Place?

As a completely independent Financial Advisor, Dan takes a thorough approach that encompasses every aspect of your financial life:

1. **Cash Flow** – Including the use of a simple, automated budgeting tool.
2. **Income Taxes** – Ensuring they're kept as low as possible.
3. **Portfolio and Debt** – Taking a close look at your cash flow coverage, debt and use of investment leverage.
4. **Wealth Growth Management** – Putting the Cyclical Investment Strategy in place with quality investment vehicles that fit your needs.
5. **Personal Risk** – Mitigating your present and future financial threats.
6. **Estate Planning** – Providing unbiased advice regarding which legal documents you need to have in place to keep and pass on your wealth. Not everyone needs a Living Trust!

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