



The S-T-A-R-S System for Retirement SuccessSM Workshops are Back!

It has been nearly 10 years since we last presented this comprehensive wealth management workshop series because we have not been actively seeking new clients. Since we use it as the framework for all our client service it has been undergoing constant revision and improvement for more than 20 years. The hallmark of this system is the focus on maximum client control over all financial matters under all circumstances.



S-T-A-R-S stands for five interrelated areas of financial planning and wealth management centered on building and preserving your family's *quality of life* through the generations.

Security – know what is **ENOUGH** and what hidden risks might threaten your *quality of life*

Tax Protection – understand how *Cash Flow, Not Income* thinking could save you income and estate taxes

Asset Control – consider *Who Can If You Can't* planning to give you more peace of mind that your successors could effectively take over and estate transfers would be smooth, simple and cost efficient

Risk-Controlled Investing – understand how managing cash, risk and taxes through strategic allocation could help to improve your net after-tax returns

Simplified Money Management – build a reliable, comprehensive system for managing all aspects of your financial life that gives you control and enables your successors to take over if and when needed

The series consists of three sessions of 2½ hours each (with a mid-point break for light refreshments) presented in our Kenwood office. It is best to start with the **Overview Workshop**, which covers in survey form all the points of the system. The follow up sessions are **Security, Asset Control and Simplified Money Management (S-A-S)** along with **Tax Protection and Risk-Controlled Investing (T-R)**. These two sessions provide in-depth details, useful strategies and tools to optimize your control over your family's wealth.

Unlike most of our recent events, this series is **not** invitation only and the public is welcome. Clients who attended long ago will find it especially helpful in dealing with the new economic challenges. You are encouraged to attend and invite friends and family members. It could be very helpful to young adults in getting their wealth building on the right foot.

This is strictly an educational workshop series. We want to update our current clients and introduce our unique approach to other attendees. No specific investments, products or recommendations will be given.

For existing clients, attending will definitely help you get more benefit from our relationship. For others, it could help you improve your current plans. The schedule and reservation procedures are on the next page.

Charles D. Vaughan, CFP®
President and Chief Strategist

Gary L. William, CFP®
Chartered Retirement
Planning Counselor

Mark G. Srofe, CFP®, AIF®
Chartered Retirement
Plans Specialist

Kimberly J. Vaughan
Client Service Director
and Events Coordinator

S-T-A-R-S System for Retirement Success®

Schedule for Upcoming Workshops

SEPTEMBER 2009		
TUESDAY 22ND	WEDNESDAY 23RD	THURSDAY 24TH
Overview 1:30 pm – 4:00 pm	Overview 1:30 pm – 4:00 pm	
TUESDAY 29TH	WEDNESDAY 30TH	
Security Asset Control Simplified Money Management 1:30 pm – 4:00 pm	Overview 1:30 pm – 4:00 pm	
OCTOBER 2009		
		THURSDAY 1ST
		Tax Protection Risk-Controlled Investing 1:30 pm – 4:00 pm
TUESDAY 6TH	WEDNESDAY 7TH	THURSDAY 8TH
Tax Protection Risk-Controlled Investing 1:30 pm – 4:00 pm		Security Asset Control Simplified Money Management 1:30 pm – 4:00 pm

All Sessions have a 20 minute break for light refreshments.

RESERVATIONS ARE REQUIRED

Please contact Kimberly at (513) 791-8899 for reservations and, if needed we will provide a map and directions to our office. Also, you may go to our website www.theretirementsource.com for additional information regarding our firm.

If you would like to attend a workshop and the current schedule will not work for you, let us know what would be convenient as we will be scheduling additional sessions.