



PYLE FINANCIAL GROUP

SATARF

On Discovery Call and/or Presentation:

"John, let me walk you through our 6 Client Characteristics. This is a good barometer for you to see if you're a good fit within our firm and for us to see if you're a good fit with us. Sound good?"

The 1st one is SAFETY. Many of our clients are in the nearing retirement or already in retirement phase of life. They want to make sure their principle is protected from loss with insulation and a volatility buffer. All our programs are designed in a way you won't lose a single penny in a down market. Is SAFETY important to you?

The next one is ACCESS to their funds. It's important to be able to make a lump-sum withdrawal or turn on a monthly income stream. Is access and consistent income important to you?

The 3rd thing is TAXES. We want to make sure our clients aren't paying additional or unnecessary taxes such as Capital Gains or specific state taxes. Agreed?

AVOIDING PROBATE is essential in Estate Planning. All our programs have a named beneficiary which bypasses probate without any additional Estate Planning tools. Does that make sense?

These next 2 are specifically important to me.

RATE OF RETURN is crazy important to me. We need to ensure you're not only beating inflation, but earning interest needed to live the comfortable retirement you deserve. We are not protecting the funds at the expense of interest, but WITH maximizing the gains in the market. We WILL make sure your money is working as hard for you as you did to earn it. Is this Crystal Clear?

The final piece is FEES. There are 2 ways we get paid in our industry: Fees and Commission. Fees come out of your pocket, your money & your account to your Financial Advisor and Financial Entity. Commission is paid by the Company, with NO MONEY coming out of your pocket, wallet, or account. Would you rather pay us a Fee or let the Company pay us?

Are these 6 things important to you? Is there ANYTHING that's important to you that's NOT on this list?

Cool, it seems at this point, we're both in agreement on what's important for your retirement.



Let's proceed to the next step.....