Teamwork and Education Help Clients Navigate Finances at All Stages of Life

financial INSIGHTS

In times of economic uncertainty, it is vital to know your financial advisor understands your goals, your tolerance for investment risk and has your best interests at heart. Having a well-established, trust-based relationship with your advisor not only helps you maintain peace of mind, it can also have a significant impact on your economic well-being.

As a fee-only investment advisory firm registered with the Securities and Exchange Commission, Financial Insights prides itself on maintaining the utmost integrity and the highest level of fiduciary responsibility in everything it does. The firm focuses on offering objective, client-centered advice for the creation, protection and preservation of wealth.

President and CEO Dorothy A. Lewis, CFP, MA leads a team of seasoned professionals who work closely together on behalf of each and every client. The Financial Insights team, which also includes Chief Investment Strategist Virginia C. Bruce, CFP and Chief Compliance Officer Terry L. Lang, IACCP, pools its considerable knowledge and expertise to develop and implement comprehensive, individualized financial plans and investment strategies that help clients establish and achieve their financial goals. The team works with attorneys, accountants and insurance professionals to help ensure all pieces of the financial puzzle — from savings to retirement to estate planning — come together seamlessly.

Financial Insights' Wealth Management Team: "Building secure futures, one relationship at a time."

Educated Clients Are Involved Clients

"I used to be a teacher, so education is an important part of how we do business at Financial Insights," Lewis says. "We want our clients to understand why we do what we do and how it is in their best interest. They need to be well informed and involved in the process."

Toward this end, Financial Insights conducts seminars and educational workshops for clients and guests. Workshops have included topics on current economic events, tax changes, retirement options and elder care issues. Education of the Financial Insights team is equally important. Team members are college graduates and/or have participated in industry focused educational courses.

"We are very thorough and candid with our clients," Bruce notes. "We tell our clients three things: what they might already know, what they may not have thought of and what they may not want to hear. They trust us because they know we work hard to provide innovative financial advice suited to their unique circumstances."

Such trust is the cornerstone of Financial Insights' relationships with clients, many of whom have been with the firm since its founding in 1981. These longstanding relationships help Financial Insights intimately understand clients evolving goals and needs. "Our corporate mission is **Building secure futures, one relationship at a time**," says Lang," and that is exactly what we strive to do."

Financial Insights specializes in helping clients sort out complicated retirement scenarios. "Our team's extensive knowledge of company and state pension plans, TIAA-CREF and other retirement plans allows us to design personalized income strategies," comments Lewis. "Problem solving is a big part of what we do. We are very adept at approaching complex situations and making them more manageable."

For more information, visit *www.financialinsights.net* or call 253-627-6010.

Financial Insights, Inc.

Financial Insights, Inc.
SEC Registered Investment Advisor.
3110 Ruston Way, Suite C • Tacoma, WA 98402
253-627-6010 • 800-576-6010
www.financialinsights.net