

# Wealth Umbrella Coaching & Benefit Network



## ■ **Personal Money Coach**

Our staff of money “coaches” are standing by 66 hours a week to answer all your questions about investments, taxes, real estate, business, insurance, debt & credit, estate planning and every area of personal finance.

## ■ **24/7 E mail Support**

365 days a year, 24 hours a day, you can e-mail an experienced financial professional who will tell you the truth about money and answer all your financial questions.

## ■ **Unlimited Financial Hotline Access**

You can call, fax or e-mail us from anywhere in the world and receive unbiased answers to any financial question from our team of experts. Our staff of experienced financial professionals can help you with every area of personal finance.

## ■ **Insurance Clearinghouses**

Exclusive access to low-cost life, auto, home, business, long-term care, medical, disability, and umbrella insurance. Our Clearinghouses do the shopping for you, so you can get the right insurance at the best price.

## ■ **Two-Year Tax Review**

A review of your last two tax returns to uncover possible missed deductions and to provide you with a comprehensive plan for your current tax situation.

## ■ **Free Deduction Detector**

A detailed booklet designed to help maximize your tax deductions. Used exclusively by our own tax preparers.

## ■ **Car-Buying Hotline**

Save up to 60% on your next car! We will tell you what the car is worth to make sure you do not overpay. In addition, we uncover the dealer “add-ons” and finance gimmicks so that you will not be ripped off.

## ■ **Debt Reduction**

Using our exclusive Debt & Credit Tracking form, our Consultants will design a plan specifically for you and work with you one-on-one to get you out of debt quickly and painlessly.

## ■ **Credit Management**

In conjunction with your debt reduction plan, our consultants will help you implement our proven strategies for repairing and strengthening your credit rating.

## ■ **College-Funding Hotline**

Our Consultants can help you decipher the array of different college funding tools. 529 plans, Education Savings Accounts, UGMAs, Hope, and Lifetime Learning Credits are just a few of the choices for one of life’s biggest expenses.

## ■ **Investment Hotline**

Toll-free access to our team of registered investment advisors. Utilizing our proven Money Movement Strategy, they will give you unbiased investment advice and recommend where to invest your money in today’s economy.

## ■ **Free Portfolio Review**

This complimentary review and analysis of your portfolio and refinement plans will make sure your investments are on track to reach your financial goals. Whether you are just starting out or already have a substantial portfolio, our investment professionals can help.

## ■ **Real Estate Strategies**

Strategies to help you buy your first home or investment property. How to use creative financing, flips, foreclosures, owner financing, tax liens and every technique used to make money in real estate.

## ■ **Business Start-up Management**

Have an idea for a business? Our Consultants can help you with the start-up, marketing, taxes and management strategies that will help you succeed.

## ■ **The Best Retirement Plan**

Roth IRA, 401(k)s, 403(b)s, SEP, Keoghs, SIMPLE – just a few of the many choices for retirement plans. Our Consultants can help you sift through all the choices and decide which is best for you.

## ■ **Free Estate Organizer**

This easy-to-complete form is designed to make sure your family is familiar with your most important records and where to find them. A must for every household.

## ■ **Consumer Buying Advice**

About to make a big purchase? Our Consumer Hotline can advise you on how to buy almost any item without overpaying.

## ■ **Incorporation Services**

Members receive entity evaluation and discounted services to form “C,” Sub “S” Corporations, Limited Liability Companies (LLC) and other business entities.

## ■ **VIP Members-Only Workshops**

As a member, you will be invited to attend our members-only workshops to learn how to make even more money in real estate and tax liens.

## ■ **1040 Prep**

Our tax professionals will prepare your IRS Form 1040 free, just for being a member and make sure you pay the least amount in taxes.