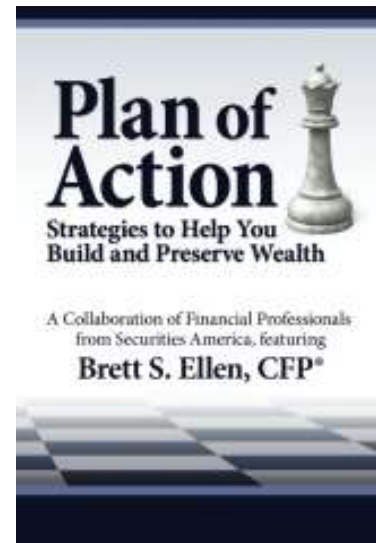




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Creating a Financial Plan of Action

New Book by Consortium of Securities America, Inc. Advisors Provides Financial Planning Tools for Improved Decision-Making

Omaha, Neb. (November 3, 2010) – Yes, it is important to create and stick to a financial plan. The problem arises in transforming that advice from theory into action. In the new book, ***Plan of Action: Strategies to Help You Build and Preserve Wealth*** (\$24.95, CreateSpace Publishing, October 2010), nine financial professionals affiliated with Securities America, Inc., one of the nation's largest independent broker/dealers, have lent their collective 175 years of industry experience to help Americans consider their financial future, begin making plans and explore the tools to help achieve their dreams. ***Plan of Action*** explores a wide range of financial planning tools and techniques and offers thought-provoking conversations about money, choices, relationships and life.

The chapters in *Plan of Action* include:

- “This Time Isn’t Different, but We Should Be” by Kristopher S. Flammang, CRPC® (co-owner of [LPF Advisors](#) in Sarasota, FL) proposes a re-definition of wealth, success and happiness. The chapter also discusses what wealth doesn’t mean in light of the last few years and what it could and should mean moving forward.
- “Balanced Wealth Approach to Planning™ – for a Truly Rich and Fulfilling Life” by Thomas J. Hine, MBA, CFS®, CFP®, (managing member of [Capital Wealth Management, LLC](#) in Glastonbury, CT) introduces the concept of a balanced approach to financial security, health, lifestyle and relationships in order to achieve a more complete and fulfilling life.

- “Taking Care of Business” by Andrew E. Oster (founder and president of Oster Financial Group LLC in Edmond, OK) provides professional advice on a range of business planning issues including establishing the most effective structure, ensuring peak operations, planning for retirement and business succession.
- “Planning with the Power of Visual Thinking” by Peggy J. Rouillier, CFP® (an investment advisor representative with Securities America in Nashville, TN) examines the use of mind mapping as a means to help individuals grapple with complicated concepts associated with wealth management.
- “A Most Essential Portfolio Review” by Howard A. Slater, MBA, ChFC®, CLU®, CFP® (founding principal of [Cedar Brook Financial Partners](#), LLC and a partner in the practice of Mannen, Munday and Slater at Cedar Brook in Cleveland OH) provides a plethora of information about insurance assets, a critical yet often overlooked piece of a total portfolio review.
- “Retirement Planning for Couples” by Kirk Hulett (senior vice president of strategy and practice management at Securities America Financial Corporation in Omaha, NE) gets the conversation rolling for couples to begin exploring together their visions for retirement.
- “Aligning Your Championship Team of Advisors” by Devery “Rusty” Cagle, CFP®, CRPC®, CAP™ (founder and president of [ASE Wealth Advisors](#) in Greenville, SC) offers a compelling argument for professional collaboration and its role in increasing the effectiveness of financial management.
- “A New Model – and Mindset – for Income Distribution” by Patricia J. Hinds, CFP® (founder of Granite Financial, Inc. in Saint Cloud, MN) offers a detailed look at retirement income distribution — an important process in the second phase of life.
- “Living a Life of Passion and Purpose,” by Brett S. Ellen, CFP® (president and chief executive officer of [American Financial Network](#) in Calabasas, CA) imparts his financial planning insights regarding tax-advantaged estate planning ideas, educating the next generation and leaving a legacy.

Plan of Action is written in accessible language and is designed to engage any reader seeking sound advice about a variety of financial planning issues appropriate for any economic environment.

Plan of Action: Strategies to Help You Build and Preserve Wealth (\$24.95, 192 pages, paperback, ISBN: 978-1-4537-8851-6) is now available at amazon.com.

About Securities America

Headquartered in Omaha, Nebraska, Securities America, Inc. has more than 1,900 financial professionals nationwide with more than \$34 billion in client assets under their supervision. Securities America Advisors, Inc. is an SEC-Registered Investment Advisory firm with more than \$11.2 billion in assets under management and administration that offers investment management, financial advice and financial planning through financial advisors. As the business growth expert, Securities America’s mission is to

foster the success of financial professionals so they can provide quality, objective counsel and services to their clients. Additional information is available at www.securitiesamerica.com.

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