ACA Member Marketplace

A new way for ACA members to connect

August 2010

this issue

Coaching for advisors and their clients

Tedd Oyler offers coaching to:

- Advisors who have been in practice long enough to have made their share of mistakes and now want to get back to basics
- Advisors who slowed down and want to invigorate their practices
- Advisors who want to effectuate their succession plan
- Anyone who thinks they are too busy and too tired.

Minimum 3 month engagement. References available.

Contact Tedd at 269-857-7778 or teddo@sirus.com. Visit www.teddoyler.com.

Get Clients Now! facilitated accountability groups by Arlene Moss

If marketing is one of your least favorite business activities or if you enjoy marketing but are not getting the results you want, Get Clients Now! will get you moving. You'll design a custom marketing plan and commit to tracking your progress for 28 days. See results that impact your business and bottom line immediately. For more information contact Arlene Moss, a licensed Get Clients Now! facilitator, at Arlene@kimberlitecoaching.com.

WHY THIS MEMBER MARKETPLACE?

We understand that many ACA members have services and/or products they would like to offer to other ACA members at a fee. Yet there has been no "socially acceptable" way to get the word out. Self-promotion via the eGroups is discouraged, as are unsolicited emails. This Member Marketplace is an effort to create a channel for intra-ACA promotions. Please let us know what you think!

FUTURE ISSUES

Depending on interest and demand, the Member Marketplace will be published every 3 or 6 months. If you'd like to be included in the next issue, please send your information to Cathy Stegmaier. ACA reserves the right to edit all submissions for best fit.

ACA alliance of cambridge advisors

Books & Other Client Resources

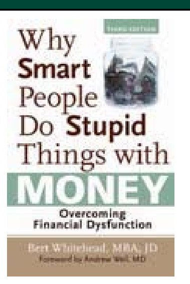
Books by Linda Leitz

We Need to Talk: Money and Kids After Divorce

The ultimate guide for single moms on working with their ex about financial issues that affect their kids (a book for single dads is in the works). We Need to Talk in paperback is available for $13.95 (shipping included)

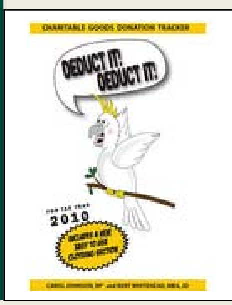
The Ultimate Parenting Map to Money Smart Kids

A fabulous guide for parents who want to teach their children to be comfortable with money and help them learn how to make smart financial decisions. This book retails for $10 in paperback or in CD audio format for $18.95 (shipping included).
Order at www.brightleitz.com . In the comments, say that the order is from an ACA member and you'll receive a 15% discount.

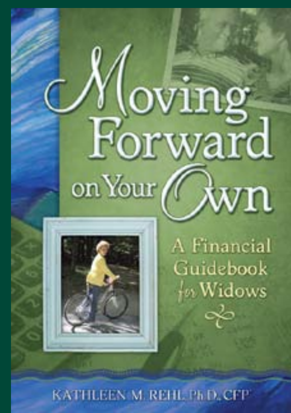


Now in paperback, Bert Whitehead's authoritative handbook addresses issue such as: money personality, symptoms of financial dysfunction, using tax efficiency to supercharge your portfolio, and much more!

Our Charitable Goods Donation Tracker is a quick and easy way to document charitable donations without using a computer. The benefits of tracking your donations will add up quickly!



Order from Bert's Book Store at www.bertwhitehead.com



Moving Forward on Your Own
A Financial Guidebook for Widows

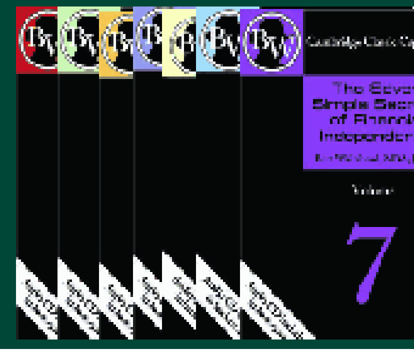
By Kathleen M. Rehl, Ph.D, CFP®

A husband's death is possibly the most devastating event a woman will experience. She might wonder, "Am I going to be able to make it on my own?" She may feel overwhelmed and not know what to do next.

This new guidebook helps widows begin to feel more secure about their financial matters, serving as a catalyst to assist women make progress after a spouse's death. It integrates basic financial information with self-reflective exercises that encourage financial self-confidence. Presented in a beautiful format, it helps to heal a woman's soul as well as gently focus on her money matters.

This guidebook is not intended to teach women everything about money and financial planning – during periods of emotional overload that's not wise. Rather, Kathleen invites widows to being looking at their money issues and then take actions in a way that builds self-assurance as they transition into a new financial life on their own.

Order for only $19.95 at www.KathleenRehl.com.



Cambridge Classic Capsules from Bert's Book Store

Volume 1: The Big Lie

"Give me your money and I'll make you rich!" How investment advisors mislead the public as to the value they really add.

Volume 2: Creative Budgeting

Cutting your expense while avoiding deprivation anxiety and improving the value you get from your money.

Volume 3: Fool's Gold—Today's Financial Fads

Sensible approaches to avoiding financial fads and focusing on the things that count.

Volume 4: Gambling to Win

Outlines the Whitehead Betting System and the pitfalls many gamblers fall prey to.

Volume 5: Financial Issues in Second Marriages

Clarifying goals and values, dealing with one another's histories, and when prenuptial agreements are important.

Volume 6: Your Money Personality

Understanding how your personality not only affects how you deal with money, but how you are also attracted to personalities the opposite of yours.

Volume 7: The 7 Simple Secrets of Financial Independence

Benchmarking your financial progree using the Financial Life Cycle, and the seven truths that debunk impoverishments myths.

Volume 8: Rational Real Estate Strategies

Guide for real estate within functional asset allocation: investments are not just stocks and bonds.

All capsules include booklet and accompanying CD!

The Cambridge Plan 401(k)

A 401(k) plan has never been easier or less expensive for you and your clients. Simplicity, automation and technology together make up the Cambridge Plan. As Matthew Hutcheson stated during our July 1st webinar; "The train is up and running and the only decision the adopting employer needs to make is if they want a seat". Virtually everything else has been well thought out and automated using state of the art technology with world class organizations such as TD Ameritrade (Custodian) and Milliman (Record keeper).

This 401(k) has combined ERISA requirements with behavior finance in order to assure the highest probability of success for both the employees and their beneficiaries. As architect of the plan Matthew Hutcheson has structured this retirement system in a way that eliminates the unnecessary friction involved in most small business plans. He describes a 401(k) as a "Bar of Soap" meaning the more it is handled, the smaller the employees ending balance will be. This plan will reduce most plans cost by 30 – 50% while providing full transparency and efficiency.

To learn more about how your clients can benefit from this revolutionary solution to America's retirement dilemma please contact us at (231) 668-4118 or email **ryan@arkadvisor.com** . You can also learn more at the ACA annual conference in October since we will be one of the sponsors.

Trust Services

G**TRUST** is a Kansas based independent trust company, specializing in complete asset management, fee only financial planning, employee benefit plans, retirement and estate planning, and trust and estate administration. Our philosophy is to provide a high degree of personalized attention to each account, caring for each client just as we would expect to be cared for by our trust and investment professionals. G**TRUST** currently serves over 1,400 clients, with assets under management of over $400 million dollars. A growing segment of our business is serving as a "Friendly" Trustee for an outside manager handling the investment portfolio.

GTRUST FINANCIAL PARTNERS

We look forward to the opportunity to be of service! For more information, please contact Richard Salmen or any of the G**TRUST** staff at 913-451-0900.

www.gtrust.com

rsalmen@gtrust.com

Client Event Speaker

Linda Leitz would love to give the talk at your event. She can speak on a variety of topics as well as tell your clients how wonderful you are. For ACA advisors, the fee is travel expenses plus the purchase and shipment of a minimum of 60 of Linda's books with the ACA 15% discount. You can call 719-260-9800 ext 6 to discuss your event with Linda.

Divorce Planning

Linda Leitz, CFP, EA CDFA

Normal rates are $200/hour, but the clients of ACA members receive a discounted rate of $150/hour. A referral to a qualified divorce planner both helps your clients through a difficult time and further cements your relationship with them. Call 719-533-1565 to schedule a free 20-minute overview.

Social Security Planning

Connie Stone will help you with social security calculations for your clients. What's the best timing for each spouse to take benefits? Should benefits be repaid to obtain a higher benefit later? Call 440-247-4870 for more information.

September, 2009 – GTRUST staff at the construction site of the new Topeka office. Move-in date was late April, 2010

You work hard.
Now relax.

Vacation Rentals

Newport, Oregon

Relax on the deck and watch the sunset over the Pacific. This 2-bedroom 11/2 bathroom condo sleeps 6 and offers secluded privacy and tons of recreational activities. Visit http://www.littlecreekcove.com/index.asp?f=condo-subpage&c=126 for all the details and photos.

Listed by Sheryl Clark

Breckenridge, Colorado

Any time of the year, this two-bedroom two-bath condo makes for a great getaway. Sleeps 8 comfortably. Visit www.breckconnect.com for photos, rates, availability and more.

Listed by Arlene Moss

Turks & Caicos

For the ultimate island vacation, book this 2-bedroom 2-bath beachfront condo at The Regent Grand on Grace Bay. Tennis, fitness center and spa on-site. Find all the details at http://www.vrbo.com/253839.

Listed by Judy McNary

ACA alliance of cambridge advisors

ACA Member Marketplace

If you'd like to list a product or service in the next issue, contact Cathy Stegmaier at Cathys@acaplanners.org or 888-834-6333 ext 707