

Providence Financial & Insurance Services specializes in conservative investment strategies and estate planning geared towards baby boomers and retirees.

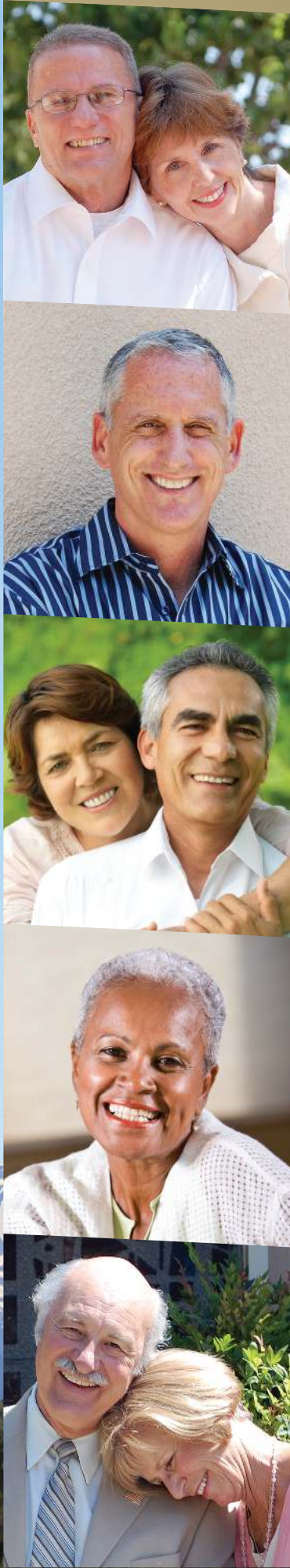
In today's uncertain and unstable economic climate, with life expectancies approaching the 90s and escalating long-term care costs that could easily deplete your estate, it is no wonder that many baby boomers and retirees are nervous about their future.

At Providence Financial & Insurance Services, we believe that the choices you make now about your financial resources will determine whether or not your retirement years are golden. Some of these decisions may be irrevocable so it is imperative that you make informed choices that will not be detrimental to your income and lifestyle.

Whether you have a moderate portfolio and are seeking conservative investment options to keep what you have earned, or you have a multi-million dollar estate and are looking for advanced estate-planning expertise, Providence Financial & Insurance Services has the knowledge and experience to help.

Call Providence Financial & Insurance Services now to schedule a complimentary one-hour consultation at our office to get the answers you need and stop worrying about your future. We will thoroughly review your situation and advise you on income strategies to improve your financial situation for a secure future.

Retirement is the most expensive investment you will make. Let us help you plan wisely for your golden years!



ABOUT US

Anthony A. Saccaro, ChFC, founder and president of Providence Financial & Insurance Services, is a financial planner and registered investment advisor - but is first and foremost an educator.

Since 1999, he has consulted with thousands of individuals about their finances. He is passionate about teaching and coaching clients on the universe of investment options in order to help them develop clear income strategies for a secure future.

Saccaro was invited to share his financial expertise on KCAL9 News, has been a guest on CNBC's "Worldwide Exchange" and makes regular live appearances on FOX Business News. He is the host of the Providence Financial Retirement Show which airs on Saturdays at 4PM PST on KRLA AM 870 The Answer.

Named one of California's Financial Leaders by *Forbes* magazine in 2013 and 2015, Anthony A. Saccaro is part of the Ed Slott Elite IRA Advisor Group. His articles have been featured in prestigious publications such as *The Wall Street Journal*, *USA Today*, *Los Angeles Daily News*, *Pasadena Star News*, *FOXBusiness* and *West Valley News*.

Saccaro is a frequent speaker on estate and financial planning topics and is a board member for Advisors Academy and for *Senior Market Advisor*, a leading industry publication.

Born and raised in Los Angeles, Saccaro's favorite pastimes include spending time with his wife Anca and son Aiden, playing golf and traveling.



WALL STREET JOURNAL  
Los Angeles Daily News  
Pasadena Star-News



# AREAS OF EXPERTISE

## Providence Financial & Insurance Services can help if you have questions about:

- Your current investments
- How to keep your money safe while earning more interest than at the bank
- Rolling over your 401K
- Maximizing your IRA
- Roth IRAs
- Whether a Roth IRA conversion is right for you
- Reducing the taxes on your investments
- Whether you have enough money to retire or maintain your standard of living
- Avoiding probate through the use of a living trust\*
- Giving to charities
- Setting up a college fund for your children or grandchildren
- When to begin taking Social Security income
- Whether you should select a Medicare or Medicare Advantage plan
- How to qualify for Medi-Cal
- Using a reverse mortgage to supplement your retirement
- Maximizing what your heirs will receive
- Financial mistakes you may be making but aren't even aware of

\* Living trusts are drafted by an independent law firm.



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*Providence Financial & Insurance Services, Inc. is a Registered Investment Advisory Firm registered with the Department of Corporations in the State of California.*

**Anthony A. Saccaro, ChFC, and Providence Financial & Insurance Services, Inc. have licences or memberships with the following regulatory activities and agencies and are in excellent standing with them. Feel free to check us out!**

**California Department of Insurance**  
License# 0C62654  
800.927.4357 | www.insurance.ca.gov

**California Department of Corporations**  
CRD# 141988  
866.275.2677 | www.corp.ca.gov

**Better Business Bureau**  
Business ID# 100109084  
800.834.1119  
www.bbb.org/losangelessiliconvalley

**National Ethics Association**  
Membership# 10165  
800.282.1831 | www.ethics.net

**Woodland Hills-Tarzana Chamber of Commerce**  
818.347.4737  
www.woodlandhillsc.com



*"And my God shall supply all your need according to His riches in glory by Christ Jesus."  
Philippians 4:19*



# PROVIDENCE FINANCIAL & INSURANCE SERVICES



## Income Strategies for a Secure Future