WEISER
FINANCIAL GROUP
Registered Investment Advisory Firm

March 24, 2023

An Open Letter to Prospective Clients:

We are an independent investment advisory firm with offices in Venice, Florida and concentrate on developing customized investment solutions for retired airline crew members. With over 15 years of experience and many satisfied retired airline clients, I am confident that we can offer you valuable insights and strategies to help you achieve your financial goals. We are licensed to conduct business in all 50 states and currently have clients in 12 states, so no matter where you are located, we can offer you, our services.

We provide competitive pricing in portfolio management, and our globally diversified portfolios are highly diversified and are monitored daily for optimal rebalancing opportunities at no extra cost to our clients. I am also proud that our 15-year affiliation with Edelman Financial Engines, who was ranked the #1 money manager by Consumer Reports Magazine and has consistently ranked #1 with Barron's ranking service over the past five years, allows us to offer you access to world-class investment strategies and resources.

Our portfolios are designed around Dimensional Fund Advisors (DFA) Funds. These funds are not available through standard retail markets and are only available through licensed advisors approved by DFA. More than 75% of DFA's funds have beaten their category benchmarks over the past 15 years, and 80% over five years, according to Morningstar.

While our account performance is not guaranteed, I am pleased to share that in 2022, our clients' accounts, on average, outperformed comparable holdings at both Fidelity and Vanguard. This is a testament to our commitment to providing our clients with superior investment management.

Together, we can assess where you stand in terms of retirement goals and risk tolerance. With so much at stake, it's crucial to work with an advisor who has your best interests at heart.

Changing investment firms or rolling over your 401(k) may seem intimidating, however, as a full-service firm it’s our responsibility to make this as efficient and effortless as possible for you. Sometimes changing course may be the best decision you could make for your financial future. By working with an advisor who is focused on your needs and has a deep understanding of your retirement landscape, you can ensure that your retirement years are as comfortable and stress-free as possible. So, let's evaluate your situation together and make sure that you're on track to enjoy the retirement you deserve.

Regards,

Daniel J. Weiser

Daniel J. Weiser, RFC®

6547 Midnight Pass Road, Box 11, Sarasota, FL 34242 ▪ (941) 363-1004 ▪ WeiserFinancialGroup@ProtonMail.com