Tony Walker FINANCIAL.COM

# NEWSLETTER FALL 2019

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## THANK YOU!

For taking the time to read our fall/winter 2019 edition of our Newsletter. As we continue to grow our practice, rest assured that we are maintaining a high-level of service and are here to help you with all of your retirement planning needs. After reviewing the information enclosed, do not hesitate to contact me personally should you have any questions or need to visit in person with me. If you're a current client, thank you for your trust and confidence in us. If you're not a client, please allow us to provide you a second opinion at no cost or obligation.

Tony


Bowling Green:
2451 Industrial Drive
Bowling Green, KY 42101

Louisville:
8303 Shelbyville Road
Louisville, KY 40222

Lexington:
2333 Alexandria Drive
Lexington, KY 40504

1.877.499.9255

# TIME FOR A REVIEW?

I often say that many in the financial world care more about your money than they do you. You'll notice this "after" you place your money with them.

In fact, one of the biggest complaints we hear from prospective clients is that they can never get a quick answer from their advisor or much less, meet with their original advisor. This won't happen at Tony Walker Financial. That is why we always encourage you to contact us whenever you have a question or need to meet with me in person.

We always appreciate your business and are here to help.



To schedule a time to meet, please email or call me right away.

Shanna@TonyWalkerFinancial.com

877.499.9255

# MONITOR YOUR PROGRESS

We know things have a way of changing and we're here to help

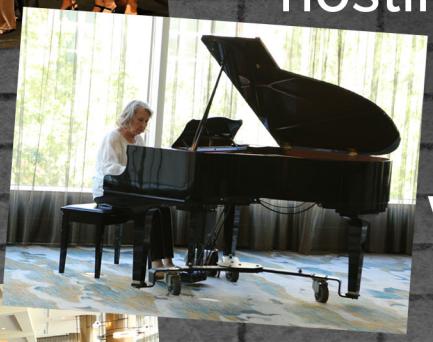
- [ ] Rollover My 401(k), IRA or Pension
- [ ] Recently Received an Inheritance
- [ ] Update My Estate Plan
- [ ] When to Begin Social Security
- [ ] Review Life/Long-Term Care Insurance
- [ ] Earn a Better Return on My Money
- [ ] Retiring Soon or Recently Retired
- [ ] Deal With My Tax Tumor®
- [ ] Just Turned or are Approaching 70½
- [ ] Protect Assets from Nursing Homes
- [ ] Medicare Supplement or Part D Plan
- [ ] Other

# CLIENT EVENTS











Our 2019 client event brought rave reviews from over 600 people who enjoyed a delicious meal and some great entertainment. For those of you who could not make it, we missed you. In an effort to try and accommodate more of your schedules, we will be hosting a few client events in 2020! Hopefully one of these events will be convenient for you. We will host one in Bowling Green and another in Louisville.

Want to hear more from violinist Daniel Morris?
www.danielmorrismusic.com

## STAY TUNED FOR DATES AND TIMES!




## GET READY!



# 401K ROLLOVER

Recently Retired?

Laid-Off?

Offered a Buyout?

Company Closing?

**Move Your 401k or Lump Sum Pension to Safer Territory!**

Don't continue to RISK your hard-earned money.

Email **Shannon** today!

**Shannon@TonyWalkerFinancial.com**

# RMD

## REQUIRED MINIMUM DISTRIBUTIONS

As always, for those of you who are over the age of 70, we will be processing your mandatory Required Minimum Distributions (RMD).

**QUESTIONS?**
Please email Heather or LeAnn!

**Heather@TonyWalkerFinancial.com**

**LeAnn@TonyWalkerFinancial.com**

# REFERRALS

Keep Them Coming!



We value your referrals and promise to take good care of them.

# RETIREMENT 101

AFRAID OF RUNNING OUT OF MONEY?

NEED TO ROLLOVER A 401(K)?

NOT SURE WHERE TO BEGIN?

Presented Personally by Nationally Recognized Retirement Planning Specialist,
TONY WALKER

Register Now At:
Tony Walker FINANCIAL.COM

Or Call:
877.499.9255

# LAST CHANCE

WORKSHOP

| December 9th 6pm EST | December 10th 6pm EST | December 12th 6pm CST |
|---|---|---|
| LOUISVILLE, KY | ELIZABETHTOWN, KY | BOWLING GREEN, KY |







***helping Savers worry less about money®***

LET US HELP YOU TOO!

**LET'S GET STARTED**

Tony Walker
FINANCIAL.COM

**1.877.499.9255**

## What We Do

- 401(k)/IRA Pension Rollovers
- Annuities
- Retirement Planning
- Life & Long-Term Care Insurance
- Tax & Fee Analysis
- Investing
- Social Security Election
- Medicare Supplements
- Final Expense/ Medicaid Crisis Planning
- Estate Planning

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# Our Team of Service Experts is Here to Serve You



**Connie Fortney**
New Business
401(k) Rollover Specialist
**Connie@TonyWalkerFinancial.com**



**Tony Walker**
Owner / Fiduciary
Financial Advisor
**Tony@TonyWalkerFinancial.com**



**Heather Hughes**
Fiduciary
Financial Advisor
**Heather@TonyWalkerFinancial.com**



**Shannon Ross**
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**Shannon@TonyWalkerFinancial.com**



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Social Security Analysis
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**Lisa@TonyWalkerFinancial.com**



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**Shanna@TonyWalkerFinancial.com**



**LeAnn Powell**
Tax Planning Administrator
**LeAnn@TonyWalkerFinancial.com**



**Jennifer Jaggers**
Annuity Administrator
**Jennifer@TonyWalkerFinancial.com**

## WorryFree Productions



**Trey Jurgens**
Life and Long-Term
Care Insurance
**Trey@TonyWalkerFinancial.com**



**Gina Tutwiler**
Insurance Administrator
**Gina@TonyWalkerFinancial.com**



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Production Manager
**Aaron@TonyWalkerFinancial.com**



**Megan Murphy**
Technical Director/Graphics
**Megan@TonyWalkerFinancial.com**

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# WATCH EVERY WEEK!

## LOUISVILLE

WLKY

**SATURDAY**
4:30AM

WAVE 3 NEWS

**SUNDAY**
5:30AM

my 58.3

**SUNDAY**
7:30AM & 6:30PM

WHAS 11

**SUNDAY**
10AM

## LEXINGTON

LEX 18

**SATURDAY**
5:30AM

## BOWLING GREEN

WNKY 40 CBS NBC MeTV

**SATURDAY**
6:30AM

abc 13 WBKO

**SUNDAY**
6:30AM & 9AM




YouTube

**WATCH FULL EPISODES ANYTIME!**

youtube.com/tonywalkerfinancial