

GOLDSTONE FINANCIAL GROUP

Anthony and Michael Pellegrino are nationally recognized as leaders in the area of investments and retirement planning. They have mentored and trained hundreds of the top financial advisors from across the country, recently addressing Advisors Excel's national semi-annual conference as two of four featured speakers. They are regularly called on by media outlets such as CNBC's Closing Bell, Forbes, Kiplinger's and Money magazines.

They host Securing Your Financial Future™ a weekly television show on CBS in Chicago.



Anthony and Michael Pellegrino can be seen hosting *Securing Your Financial Future™* every Sunday on CBS Chicago at 10:30am CT following *Face the Nation*.

New Strategies with Potential to Provide Financial Peace of Mind for Retirement

Since the start of the prolonged economic downturn that began in 2008, savvy investors, especially retirees and those nearing retirement, have questioned the traditional “buy and hold” philosophy. Instead, they are looking for strategies that balance wealth building with wealth preservation.

“While the last market collapse was historic in its duration, they have always been a part of ongoing stock market cycles. On average, we have one every 5-7 years,” reports Anthony Pellegrino who leads Goldstone Financial Group along with his brother and business partner Michael Pellegrino. “The question is not whether the market will experience another crisis, but when will it strike again? How much will it drop the next time it does? How you will plan for it? How many times can you weather a 20-50 percent loss in the market at your current stage of life?”

“Losses to your portfolio in the final few years before retirement or shortly thereafter can plunder a lifetime of disciplined savings. That’s why those who have 10 years or less before they retire tell us their No. 1 goal is peace of mind. Rather than taking risks in search of the big score, they choose to secure guaranteed income they won’t outlive for a portion of their portfolio,” explains Michael.

As owners of Goldstone Financial Group, a Registered Investment Advisor, Anthony and Michael have been helping make it possible to protect hard-earned assets, position investors to take advantage of growth opportunities and create predictable sources of income that will last throughout retirement. Crafting portfolios that are customized for each individual investor and produce reliable monthly retirement income is a specialty of Goldstone Financial Group, an independent financial services firm.

“We are committed to help create confident investors through potentially lower risk, lower volatility investing with active management,” says Anthony. “We utilize tactical asset managed accounts designed to help weather unpredictable markets or economic environments that

may lie ahead. Our philosophy is to strive for fair growth in up years, while minimizing the effect of the Wall Street roller coaster in bad years.”

“Compared to typical long-term strategic asset allocation, tactical asset allocation involves making appropriate moves in anticipation of changes in the marketplace,” adds Michael “In a defensive posture, we have the ability to shift a portfolio away from equities to more cash, when it’s called for, and return to equities or any of a wide number of investment vehicles when it’s safe to do so. These strategies can potentially help limit big swings in bad economies.



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