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Generational Wealth Builder

“Preserving Our Wealth for the Next Generation”

Status: Corporate Attorney; HNW Income; Married to Linda for 40 years; 5 grandchildren, Plans to retire in 2 years

Hobbies: Boating and Travel

Investment Goals

- Continue funding 529 College Savings Plans for his grandchildren and generate enough income to provide for multiple generations of his family
- Generate income to fund extensive travel plans
- Augment current investment strategy beyond total return approach

Frustrations

- As a long-term investor, he is excited about participating in market upturns, but doesn't want to sell certain assets to fund lifestyle expenses
- As a corporate attorney, he's a savvy investor, but feels the options he's hearing about will lock him into a plan he can't change

MAI Benefits

- Liquidity and flexibility (not locked in)
- Preserve principal with consistent dividend income; investors can wait out market headwinds and volatility without selling shares
- Boost income; Good alternative portfolio to support needs separate from a total return portfolio objective