



Jane
61

Recent Retiree

“Optimizing My Income Stream so I Don’t Have to Worry...”

Status: Active Retiree, Widow, Grandmother, Plans to Claim Social Security at full retirement age, Doesn’t watch the Markets

Hobbies: Furniture Refinishing and Interior Design

Investment Goals

- Maximize income without eating into principal. Growth is a secondary goal
- Wants supplemental income to pay for vacations with her grandchildren twice a year
- Not an actively engaged investor, so wants a low maintenance solution

Frustrations

- Former advisors were not transparent about liquidity and hidden fees in various investments
- Since her husband’s passing, Jane feels less secure about financial decisions and seeks peace of mind when it comes to investing and money management

MAI Benefits

- Offers transparency of risks, costs, and investment decisions
- Helps preserve the principal of her portfolio
- Performs well in times of market volatility; Historically, dividends streams have been more consistent than capital appreciation over time
- Requires minimal portfolio monitoring by both advisor and investor (daily monitoring provided by New Frontier Advisors)