

Vision News and Views

2017



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NEWS

What to Expect From Us in 2017

Our promise to you is to help you achieve financial confidence. To that end, here are things you can expect from us in 2017:

1. We will serve as a “noise funnel.” Information is everywhere and comes at us at a faster pace than ever. We gather data, information, and opinions through our funnel and only pass on what we believe to be realistic and important to you. Let us help you block out the “noise.”
2. A review of your goals. We will continue to provide personalized financial planning advice and recommendations for your situation, then monitor and adjust as needed.
3. New investment products, ideas and strategies. We strive to stay abreast of changes in our industry, the economy, our profession so that we can recommend those that provide opportunities to help you reach your goals.
4. Tips on how to live well. We are excited about our ongoing relationship with the MIT

AgeLab through Hartford Funds from whom we will share timely tips, topics, and resources to help you live and age well.

5. New ways to communicate, access your information, and get things done. Did you know you can sign forms electronically? Access your Raymond James account using your iPhone? These are just a couple examples of ways technology can be used to save time and provide information when you want it.

6. A steady hand. I’m a planner rather than a prognosticator. Political change brings with it opportunities as well as pitfalls. My highest value services are planning and behavioral coaching – helping you avoid overreacting to market events both negative and positive.

As always, I invite your questions, concerns and comments. My team and I look forward to serving you in 2017!

Raymond James is not affiliated with MIT AgeLab or Hartford Funds.



VIEWS

The ABC’s of Life

This sentiment hangs on a plaque in our office and the words of wisdom are applicable year-round.

Accept Differences

Be Kind

Count Your Blessings

Dream

Express Thanks

Forgive

Give Freely

Harm No One

Imagine More

Jettison Anger

Keep Confidences

Love Truly

Master Something

Nurture Hope

Open Your Mind

Pack Lightly

Quell Rumors

Reciprocate

Seek Wisdom

Touch Hearts

Understand

Value Truth

Win Graciously

Xeriscape

Yearn for Peace

Zealously Support a Worthy Cause



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Words to live by:

*“Age is something
that doesn’t matter
unless you’re a
cheese.”*

NEWS

Technology Can Transform Your Retirement

We’re living longer—and healthier—than our predecessors thanks to dramatic advancements in health care over the last century. And now, thanks to technological innovations, the way we age is transforming from living longer to living better. Technology can make it easier for you to work, stay healthy, live in the home of your choice, and remain socially connected as you age. Listed below are some apps and devices that might be helpful .



EdX—Find the latest free online courses from the world’s best universities, including MIT, Harvard, Berkeley and others.



MedCoach—Medical app that reminds you to take your medications at the right time, on the right day. Connects to your pharmacy to refill your prescriptions.



Nest—A thermostat that automatically adapts as your life and the seasons change. Just use it for a week and it programs itself.



Connected Living—Connects older adults in senior housing with each other and their families.



Elevate—A brain-training program designed to improve attention, speaking skills, processing speed, memory, math skills, and more.

Contact us for more information on how technology can help you live a better life during retirement.

Raymond James is not affiliated with any of the apps mentioned herein.

NEWS

“Yes, I am a Fiduciary.”

You may read or hear about the new Department of Labor (DOL) rule related to who is considered a “fiduciary.” The intent of this ruling strives to clarify who is considered a fiduciary and what products can be offered, particularly as it relates to retirement accounts. Application of this new ruling may require changes in your retirement account(s) and if so, we will contact you as needed.