

FEE-ONLY FINANCIAL ADVISORS



*Mapping Your Financial Future.
Registered Investment Advisor*

FINANCIAL PLANNING NEWSLETTER

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Why Legend Is Different:

1. **Unlike Brokerage Firms and Fee-Based Advisors who both receive commissions and as a result are inherently conflicted; Legend is compensated exclusively by client fees, known as Fee-Only.**
2. **Legend works in the clients' best interests as a fiduciary.**
3. **Legend's Advisors have been selected over 30 times by national publications as "Best Advisors in the Country".**
4. **Legend designs creative, customized and unbiased portfolios utilizing cutting-edge investment solutions.**

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INTRODUCTION

This educational newsletter about improving your finances is a service, provided courtesy of Legend Financial Advisors, Inc.® (Legend). Legend is widely recognized as one of the nation's leading financial advisory firms and serves clients nationwide. Members of Legend's advisory team have been selected a total of 15 times to **Worth** magazine's elite list of "**The Top Wealth Advisors in America**". They have also been selected 20 times by **Medical Economics** magazine as one of "**The 150 Best Financial Advisors for Doctors in America**", five times to **Dental Practice Report** magazine's list of the "**Best Financial Advisors for Dentists in America**", and twice as one of "**The 100 Great Financial Planners in America**" by **Mutual Funds** magazine.

ARTICLES

Legend Profiled In The Suit Magazine:

The Suit Magazine recently featured Legend in an article entitled "A "Legend"ary Advisory Firm". The article primarily discussed the relationships Legend shares with its clients and some of the benefits of using a Fee-Only advisory firm. Louis P. Stanasolovich, CFP®, founder, CCO, CEO and President, was quoted several times in the article. To view this article, please [click here](#).

How Will Your Retirement Distributions Be Taxed?

Your retirement income likely will come from a variety of sources. For example, there is Social Security as well as brokerage accounts, employer-sponsored retirement plans, traditional and Roth IRAs, and tax-deferred annuities, among other possibilities. With so many choices at your disposal, you'll need to decide when to tap each of those sources, and taxes will be one key factor in making those decisions. Learn more by reading "[How Will Your Retirement Distributions Be Taxed?](#)". For further information, contact Legend's [Diane M. Pearson](#), CFP®, PPC™, CDFATM at (412) 635-9210.

14 Sure-Fire Midyear Tax Planning Moves In '14

Even as we approach the midpoint of this year, it's still not clear whether some favorable tax provisions that officially expired last year will be extended retroactively into 2014. Yet, while that uncertainty could affect your tax planning for this year, there's plenty we do know that you could act upon. Learn more by reading "[14 Sure-Fire Midyear Tax Planning Moves In '14](#)". For further information, contact Legend's [James J. Holtzman](#), CFP®, CPA at (412) 635-9210.

Identifying Investment Risk And Coping With It

Are you a risk-taker? To realize rewards, you usually have to take some risks, especially when it comes to finances. But beyond understanding that investment risk and reward go hand in hand, it's important to know how they relate. What is the nature of risk, and how can you handle the different kinds of risk that could affect the performance of your investments?

Share With Your Friends



If you wish to discontinue receiving this newsletter, simply [click here](#) and follow the link to unsubscribe.

Learn more by reading "[Identifying Investment Risk And Coping With It](#)". For further information, contact Legend's CCO, CEO, and President [Louis P. Stanasolovich](#), CFP® at (412) 635-9210.

Reminders On Your Beneficiary Choices

Quick: Who are the beneficiaries of your retirement plan, life insurance policies, and investment accounts? Many people don't remember whom they named as a beneficiary or are uncertain. But it's important to know, especially if your circumstances have changed since you completed the original paperwork. Learn more by reading "[Reminders On Your Beneficiary Choices](#)". For further information, contact Legend's [James J. Holtzman](#), CFP®, CPA at (412) 635-9210.

Seven Steps To Digging Your Way Out Of Deep Debt

If you owe a lot of money to multiple creditors, it's easy to feel your situation is hopeless. Yet while digging out of a mountain of debt is never easy, taking a systematic approach may help you make progress. Learn more by reading "[Seven Steps To Digging Your Way Out Of Deep Debt](#)". For further information, contact Legend's [Diane M. Pearson](#), CFP®, PPC™, CDFATM at (412) 635-9210.

Speaking Engagements

We are available to speak and/or make a presentation, free of charge, to any organization. Please contact Chris Kail at (412) 635-9210 to discuss any speaking opportunities. Senior citizen groups, investment clubs, medical societies, religious organizations, educational institutions and professional groups are typical audiences.

About Legend

[Legend Financial Advisors, Inc.](#)® (Legend) is a Fee-Only U.S. Securities and Exchange Commission registered investment advisory firm with its headquarters located in Pittsburgh, Pennsylvania. Legend provides Wealth Advisory Services including Financial Planning and Investment Management strategies to affluent and wealthy individuals as well as business entities and non-profit organizations.

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