

FORTUNE FINANCIAL GROUP, INC.

FFG

Creating a Financial Plan

Focus on the whole package
or on one piece of the pie.

No income or asset minimums

Financial Planning Services Menu



For more information follow our
blog at www.lifeplanningtoday.com

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Comprehensive Financial Planning

Obtain personal attention for all of your financial planning needs. Get OBJECTIVE answers to the questions that are on your mind. The questions that keep you up at night:

1. Will I have enough money to retire?
2. Is my estate plan in good order? Do I have the appropriate wills and trusts in place?
3. What is the best manner to pass wealth to my children/grandchildren?
4. Have I done the proper business succession planning?
5. Am I taking full advantage of the benefits my employer has to offer? How much should I be saving in my 401k?
6. Do I have adequate insurance coverage including life, disability and long term care insurance?
7. How should I be investing my money? Are my investments properly allocated to match my risk tolerance and time horizon?
8. Are my investments tax efficient?
9. Am I taking advantage of tax saving strategies?
10. Am I adequately saving for my children's college education?

Choose from our Financial Planning Menu

Answers to you Critical planning questions



Retirement Income Analysis Plan

When will I be able to afford to quit working?

Have I mapped out our future cash flows factoring in income and expense?

How much monthly income will I have to live on during retirement?

How much should I be funding in my 401K or IRA?

When should I take my social security?
(complimentary analysis)

Am I investing my money in the right places for retirement?



Estate Planning Analysis

Is my estate plan in good order?

What is the best manner to pass wealth to my children/grandchildren?

If I am charitably inclined what is the best way to set up my legacy plan?



Comprehensive Insurance Analysis

Do I have the adequate level of life insurance?

Is my life insurance coverage the appropriate type for my needs?

Am I adequately covered if I were disabled or needed long term care?

Is my insurance coverage consistent with my estate planning goals?



Investment Portfolio Analysis

Is my portfolio prudently diversified and designed to meet my unique goals?

Are my investments properly allocated to match the amount of volatility I am willing to endure and my time horizon?

Am I taking advantage of tax favored investment vehicles?



Ongoing Asset Management (Complimentary analysis)

Can you assist me with portfolio construction and management?

Will you monitor my investment allocation and actively rebalance my portfolio?

How can I reduce the level of risk in my portfolio?

How are my various investments performing relative to their respective benchmarks?

Should I diversify using asset classes such as alternative investments? (for example gold or commodities or Real Estate Investment Trusts)

How can I reduce my tax bill?



College Saving Planning

Am I adequately saving for college expenses?

What is the most effective way to save and in which types of accounts; 529s, UTMA, UTGM, trusts?

What are the best gifting strategies for my situation?

How can I maximize any loan opportunities?

The Faces Behind Fortune Financial

Get to know your financial advisor . . .



Brad Rosley, CFP®, has been providing financial solutions to his client's since 1986. He is the founder and President of FFG which opened in Glen Ellyn in 1996. He graduated from the University of Iowa in 1986 with a Bachelor's Degree in Finance. He has been a Certified Financial Planner since 1990 and helping individuals with their financial decisions for over 25 years.

Brad has been quoted and written articles in several publications including Chicago Magazine and Business Week. "Brad Rosley on Educated Investing" was published in 2001. Brad is a long standing member of the Financial Planning Association of Illinois (FPA®) holding several offices over the years. In 2009 he served as President and Chairman of the Board in 2010 of the 1,100 member Illinois Chapter of the FPA®.

Brad, his wife Soni and their three children reside in Glen Ellyn where he is on the Board of Directors of the West Suburban Baseball League and Co-Founder of the GE Travel Baseball Organization.



Ann Gunst, CFP®, CPA graduated Magna Cum Laude with a BS in accounting from the Kelley School of Business at Indiana University. She is a Certified Public Accountant (CPA) and a Certified Financial Planner™ (CFP®). She has a more than a decade of experience in the financial services industry coupled with greater than 12 years experience in financial consulting and accounting.

Ann is dedicated to her family; she has three children. In addition to her focus as a Financial Planner, she a member of the Boards of Governors for Elmhurst Memorial Healthcare and was the first woman elected to the Board of Directors at Medinah Country Club.

An avid golfer, Ann served as Director of Administration for the 2006 PGA Championship and is currently serving as an Executive Vice Chairperson for the 2012 Ryder Cup. Ann prides herself on investing the time to get to know our clients personally, as well as thoroughly understanding their goals, interests, and concerns.

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